

# **EnvisionWare® PC Reservation®**

## **User Manual**

**Version 4.3**

**Released: January 15, 2014**



## EnvisionWare® PC Reservation®

**Copyright © 2012-2014 EnvisionWare® Inc. – All rights reserved.**

PC Reservation and EnvisionWare registered trademarks of EnvisionWare, Inc. Microsoft and Windows are registered trademarks of Microsoft Corporation. Vista is a trademark of Microsoft Corporation. Mac, Mac OS, Tiger, Panther, Leopard, Snow Leopard, and Lion, are trademarks of Apple Inc., registered in the U.S. and other countries. Clean State is a registered trademark of Fortres Grand Corporation. Deep Freeze is a trademark of Faronics. SteadyState is a trademark of Microsoft.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form by any means electronic, mechanical, photocopy, recording or otherwise, without the prior permission of the publisher, except as permitted by U.S.A. copyright law.

Second Publication January 2014  
Published in the United States of America

Information in this document is subject to change without notice and does not represent a commitment on the part of EnvisionWare. The software described in this document is furnished under the EnvisionWare End User License Agreement (EULA). The software may be used or copied only in accordance with the terms of the agreement. Content is based upon information available at publication time.

EnvisionWare, Inc.  
2855 Premiere Parkway | Suite A  
Duluth, Georgia 30097-5201  
USA

EnvisionWare Pty Ltd  
10 George Street  
Stepney, South Australia 5069  
Australia

## Foreword

Thank you for purchasing PC Reservation, the modular solution for staff-managed, and self-service computer Access and Session management.

PC Reservation scales to fit the needs and budget from the smallest facility to large enterprise networks with thousands of public computers. Because of its Distributed Processing Architecture, PC Reservation provides the same performance regardless of the size of the network. Reservations are seamlessly managed by staff and the public using a Staff Reservation Station, Self Service Reservation Station or Web Module. Coupled with the included Central Management Solution, PC Reservation can be centrally managed for a multi-branch facility or consortia. The software adapts to the needs of every library through an extensive set of point and click preferences.

### EnvisionWare Mission Statement

*"To provide our customers with quality products and exceptional service. We strive to maintain our reputation for integrity, responsiveness, and fairness, with customers, suppliers, competitors, and employees."*

We encourage you to provide feedback concerning new features. Thanks to feedback from customers like you, EnvisionWare has become the Company that produces *software that works the way you want it to*. Thanks again for using our products.

--- *The EnvisionWare Team*

## Table of Contents

<b>Chapter 1 – Providing a System Overview.....</b>	<b>6</b>
Understanding PC Reservation V4 Components.....	6
Understanding the Process.....	7
PC Reservation V4 Connections Diagram .....	7
Defining EnvisionWare PC Reservation Client for Windows .....	9
<b>Chapter 2 – Understanding the V4 Client Main Screen .....</b>	<b>10</b>
Illustrating V4 Client Screen At-A-Glance.....	11
Institution's Logo .....	12
PC Area Name .....	12
Institution's News .....	12
Client/User Instructions.....	12
PC Reservation Logo.....	12
Client Status and User Information.....	13
System Time .....	13
<b>Chapter 3 – Performing User Functions.....</b>	<b>14</b>
Tracking Computer Use via Minutes .....	14
Tracking Computer Use via Sessions.....	15
Making a Reservation via a Self-Service Reservation Station for Next Available PC .....	16
Making a Reservation via the Web Module for Next Available PC .....	20
Making a Reservation via a Client Using @Client Reservations .....	24
Trading a Future Reservation for a Reservation Now at the Client .....	27
Trading a Reservation at the Self-Service Reservation Station.....	32
Signing Into an Available Short Session Now.....	38
Signing Into a Session Reserved from a Reservation Station .....	41
Signing Into a Session for an Early Login at the PC Reservation Client .....	44
Signing Into a Session when Using a Specified User Prefixes .....	44
Accepting a Computer Use Policy.....	47
Declining a Computer Use Policy .....	50
Bypassing the Computer Use Policy when Resuming 'On-Hold' Session .....	54
Selecting and Changing the Session Language.....	56
Change the Language via the Status Window .....	56
Change the Language via the Login Window .....	58
Change the Language via the Computer Use Policy Acceptance Screen.....	61
Change the Language via the Control Menu in a Session .....	65
Viewing the Welcome Message Screen .....	67
Monitoring 'Session Time' During a Session.....	72

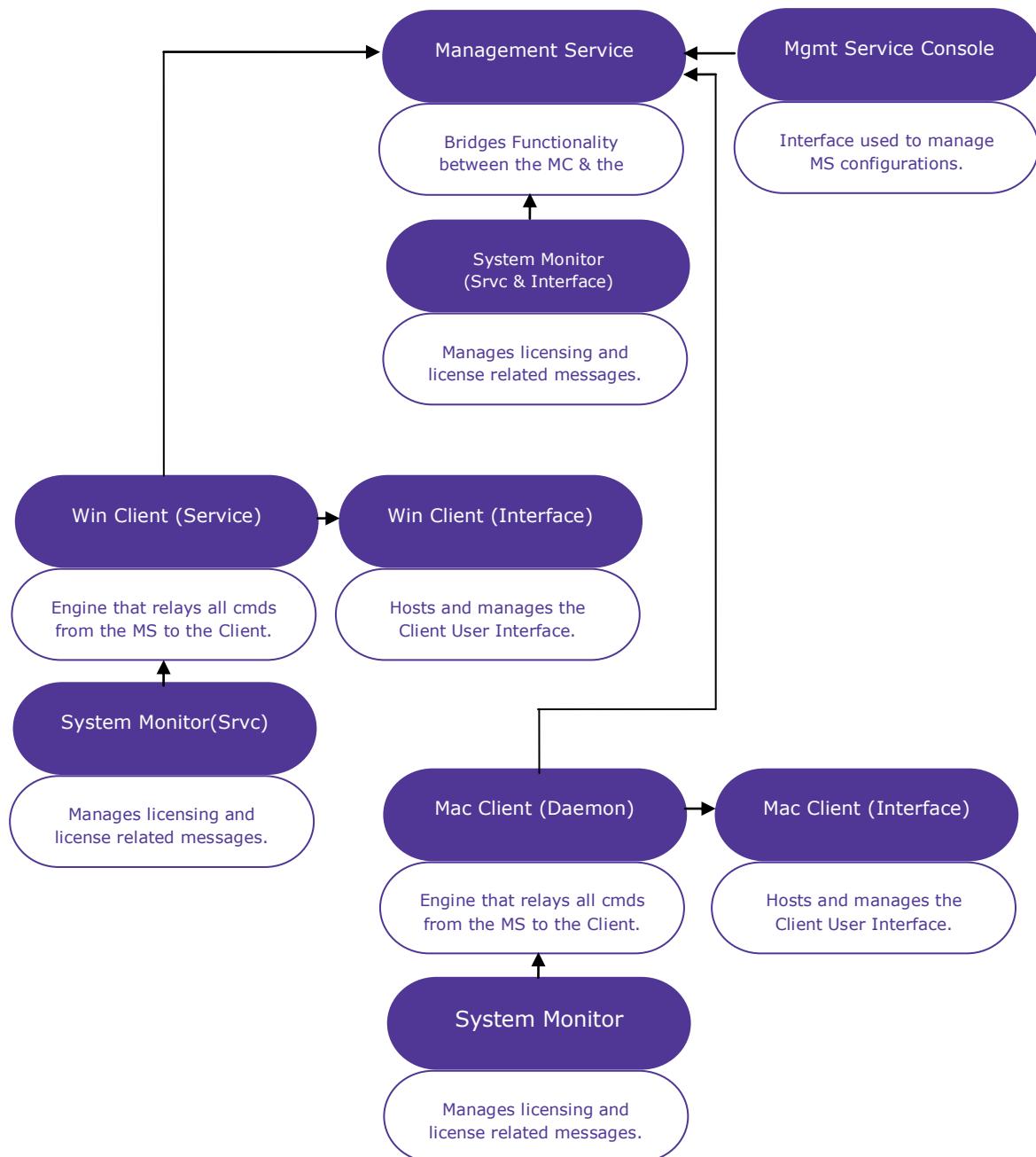
Hiding a Session using the Control Menu Buttons .....	75
Hiding a Session using the Control Menu Combobox .....	79
Ending a Session using Control Menu Buttons.....	83
Ending a Session using Control Menu Combobox.....	84
<b>Chapter 4 – Performing Staff Functions .....</b>	<b>86</b>
Identifying Client Login Statuses .....	86
Performing a Super-User Login .....	91
Performing a Stand-Alone Login.....	93
<b>Customer Feedback.....</b>	<b>95</b>

## Chapter 1 – Providing a System Overview

PC Reservation V4 is a new generation of computer management software from the world's leading publisher of library self service solutions. The following provides a high level overview of this new generation.

### Understanding PC Reservation V4 Components

The following diagram illustrates PC Reservation V4 component connections and provides a brief description of the general functionality for each component within the system.

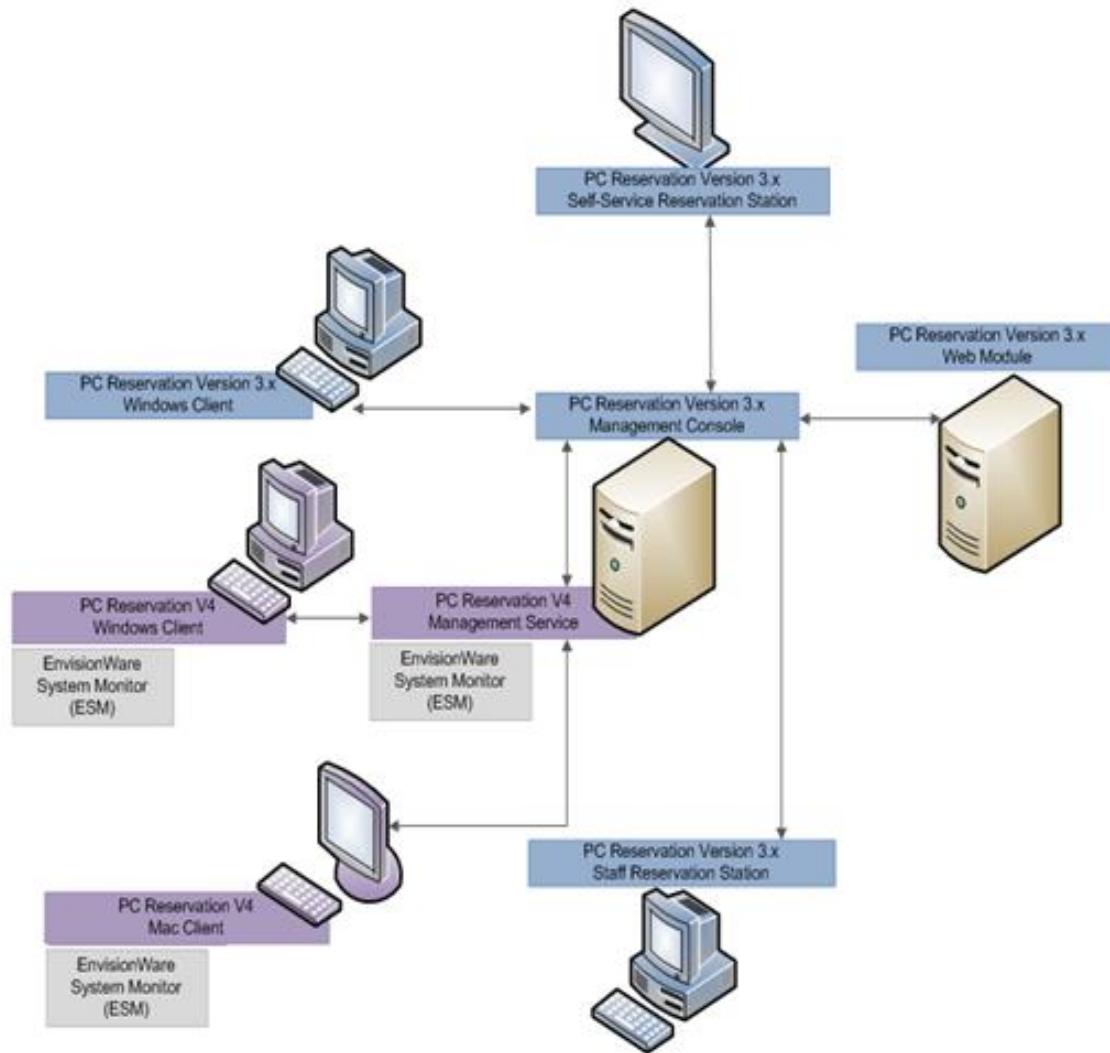


## Understanding the Process

The following section illustrates the communications process.

### PC Reservation V4 Connections Diagram

The following diagram displays the V4's versatility. The V4 Client coexists with Version 3.x. The blue areas represent Version 3.x components while the Purple areas represent V4 components.



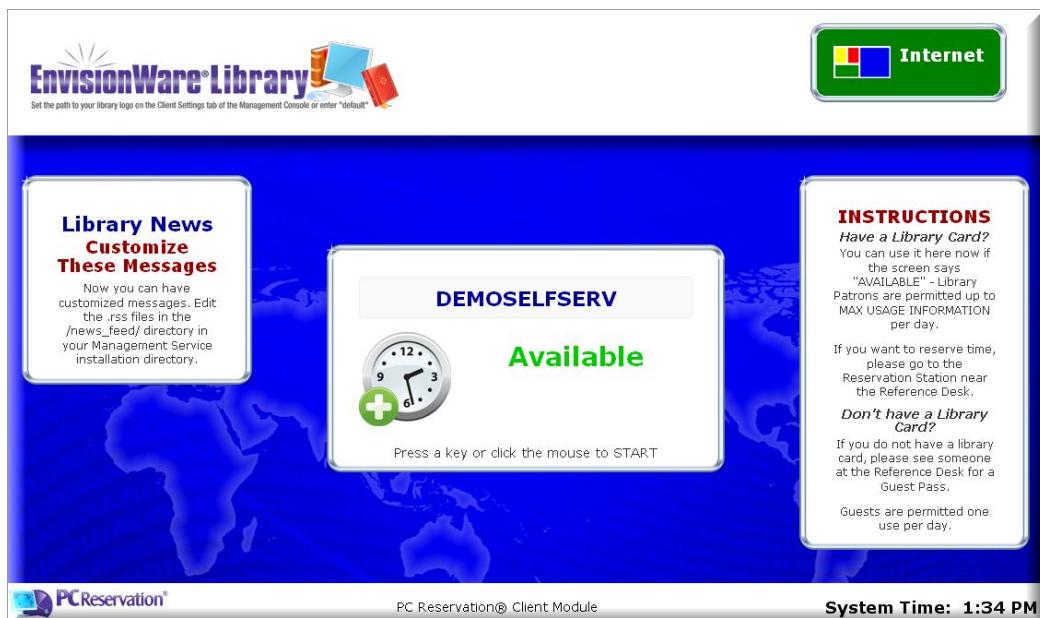
Migrating from PC Reservation Version 3.x to V4 will occur in phases. Most of your components will remain the same. Implementation for V4x consists of the following components:

- **Management Console (3.5.x)** – The 3x Management Console remains the primary logic component of the system in this release. However, some configuration options which are new to the V4 architecture are configured in the Management Service. In the final phase of migration to V4, the Management Console will be replaced in its entirety by the new Management Service.

- **Management Service** (V4) – This new component is responsible for communicating with the V4 Client and for controlling the logic related to new Client functionality. The Service delivers the new Management Service Console.
- **Management Service Console** (V4) – A web-based administrative interface for the Management Service.
- **Staff-Managed Reservation Station** (3.5.X) - This component is unchanged and is part of the current Version 3.x design. Information about this module may be found in the Version 3.x Technical Manual.
- **Self-Service Reservation Station** (3.5.X) – This component is unchanged and is part of the current Version 3.x design. Information about this module may be found in the Version 3.x Technical Manual
- **Version 3 Windows Client** (3.5.X) – While V4 includes a re-architected Client, the institution can maintain the existing Version 3.5.x client on some public computers as desired.
- **Version 4 Client** (V4) – The V4 Client provides a completely new PC Reservation Client. As in the past, the Client manages Windows computers, and, for the first time, an implementation that supports Mac.
- **EnvisionWare System Monitor (ESM)** – ESM monitors your system to ensure that all components are functioning normally and provides the auto-update support for future releases of the V4 Client.

## Defining EnvisionWare PC Reservation Client for Windows

Reservations are made using more than one PC Reservation component. The V4 Client allows users to access a computer via the Client application. This functionality however is configurable. This means that the system can be configured to not allow a '**@Client Reservation**'. The V4 Client works with the Client Service and Management Service to ensure configured functionality is passed to the user via the Client interface component.



## Chapter 2 – Understanding the V4 Client Main Screen

This chapter details the following enhanced and redesigned V4 Client functionality:

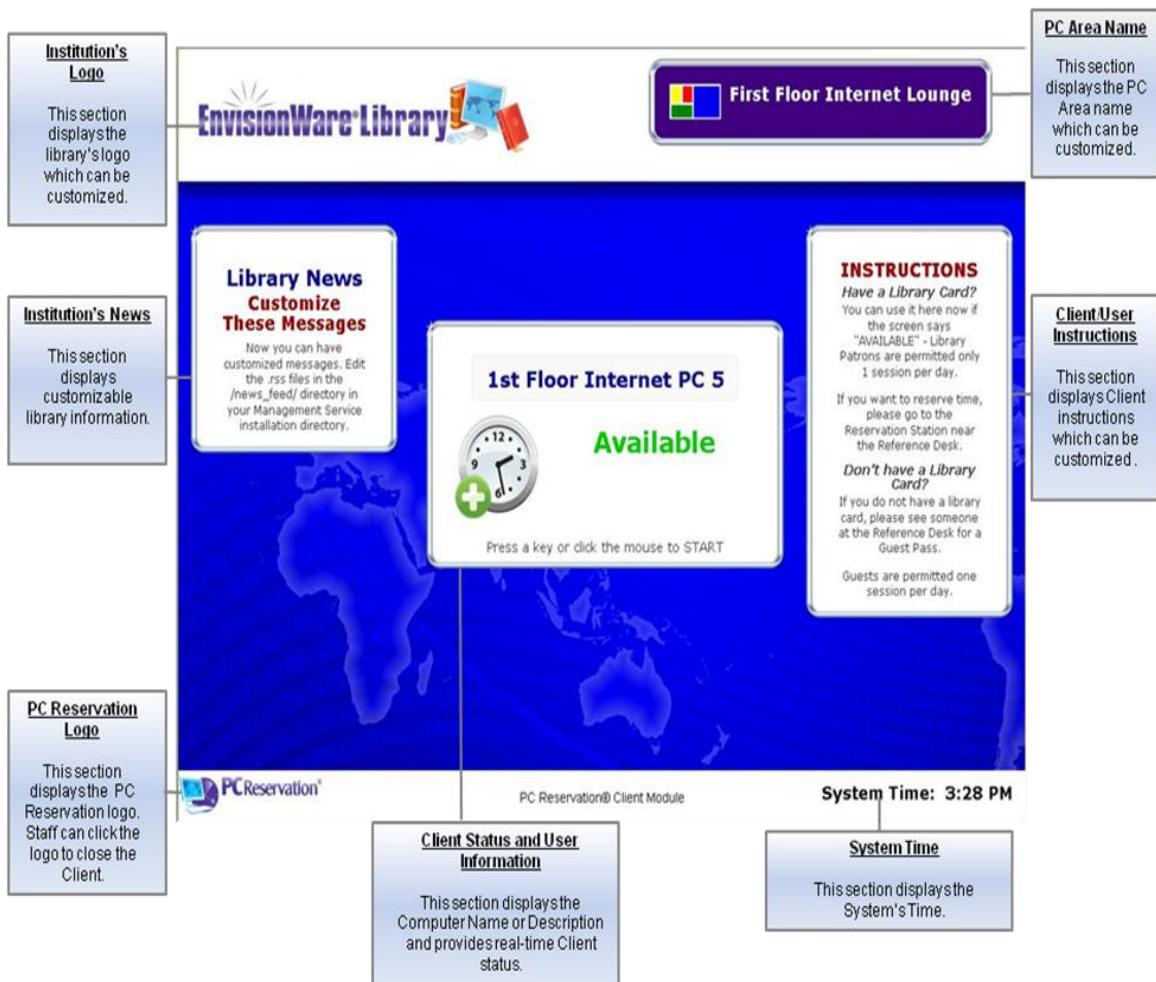
- V4 Client Screen at-A-Glance
- Institution's Logo
- PC Area Name
- Institution's News
- Client/User Instructions
- PC Reservation Logo
- Client Status and User Information
- System Time

## Illustrating V4 Client Screen At-A-Glance

The PC Reservation V4 Client Module is completely re-designed and enhanced with many new features while maintaining a level of familiarity for users of the existing Version 3.x Clients. Every effort has been made to make the design function in a similar manner to that of existing installations except where improvements to the design would offer a more intuitive experience.

Most of the information displayed on the Main Screen can be configured by the library staff.

The following is an example of the V4 Client Main Screen. Please note that some items are available via configuration:



The user interface is more robust, intuitive and provides users and staff with important information such as:

## Institution's Logo

- In Version 3.x, the logo had to be shared or installed locally on each computer.
- In V4, the logo may be configured centrally and displays via the Client interface automatically. System Administrators must ensure that when configuring their logo file, that the full path to include the logo name is used. For example: C:\Program Files\EnvisionWare\PC Reservation \ClientPCRLLogo.png.
- A customizable default logo is offered if the Library has no logo suitable for this position.

## PC Area Name

- The Version 3.x Client did not automatically display the area name.
- In V4 the area name displays automatically when configured. If no area is assigned, 'Global' appears suggesting that all settings are pulled from the general set of settings in the Management Console's Preferences.

## Institution's News

- New Functionality only available in V4.
- The purpose of this new area is to display news items and upcoming events within the facility.

## Client/User Instructions

- In Version 3.x, a limited text guide for login information displayed in the center.
- In V4, there is considerably more space to display detailed instructions to users and guests using PC Reservation.

## PC Reservation Logo

- In Version 3.x, the logo is considerably larger.
- In V4, the logo size is significantly reduced.
- The use of the PC Reservation logo remains consistent with behavior in the 3x Client for accessing staff functions.

## Client Status and User Information

- Displays the computer name or description based on the configuration in the Management Console.
- Displays the Computer status (Available, Unavailable, Offline, etc)
- Users can log in with their credentials to start a session if the system is configured to allow reservations from the Client.

## System Time

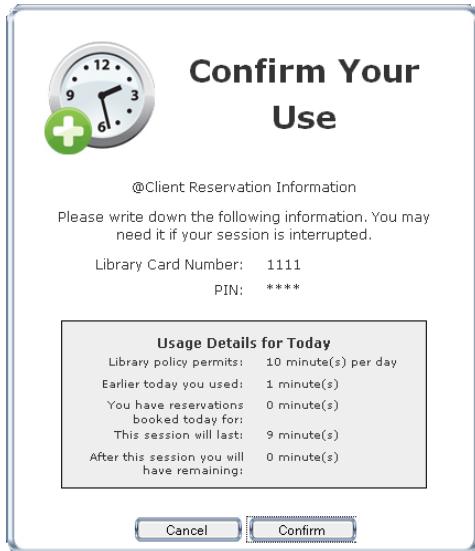
- In Version 3.x, the Client displayed the time on the Client computer and a 3<sup>rd</sup> party program was required to synchronize the time on the Client computers with the time on the Management Console host computer.
- In V4, 'System Time' reflects the time set on the Management Service host computer. This value is configured via the Management Console. Once configured, the Management Service must be restarted for the configuration to take effect on the Client program

## Chapter 3 – Performing User Functions

This chapter contains sections which walk you through the user experience with the reservation system.

### Tracking Computer Use via Minutes

The V4 Client displays the following detailed minute information when users login to a session when the system is configured to track minutes.



In the event a patron does not use all of the minutes available in the session for minute tracking, the minutes will remain to the account of the patron to use at a later time.

## Tracking Computer Use via Sessions

The V4 Client displays the following detailed session information when users login to a session when the system is configured to track sessions.



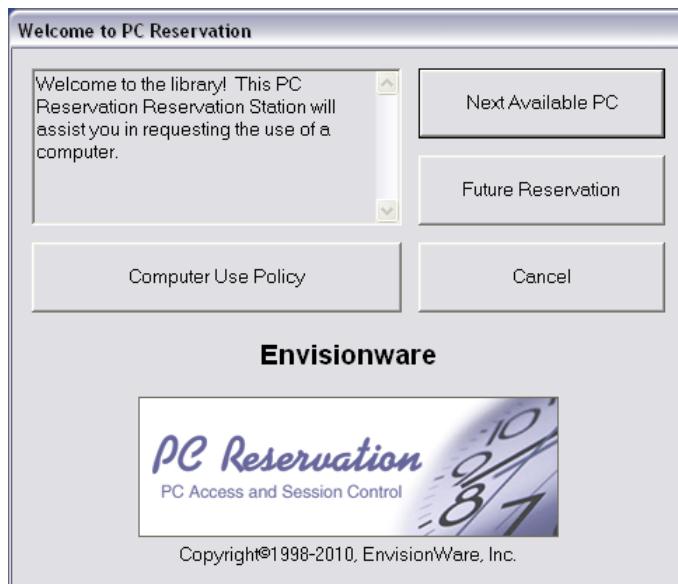
In the event a patron does not use all of the minutes available in the session for session tracking, the unused minutes are forfeited and will not be available for patron use at a later time.

## Making a Reservation via a Self-Service Reservation Station for Next Available PC

Complete the following to make a reservation at the Self-Service Reservation Station for the next available computer:

1. Go to the Self-Service Reservation Station and move the mouse or click the screen to access the Login/Welcome Screen.

*The system displays the 'Welcome' / Login Screen*



2. See the following items explaining the functionality of this screen:

- As users approach a **Self-Service Reservation Station**, the idle screen may be displayed.
- Moving the mouse or pressing a key brings the computer out of its idle state. If no action is taken within 30 seconds, the computer returns to the idle screen.
- **Welcome Screen:** Provides instructions to the user.
- **Computer Use Policy:** Clicking this button displays the Computer Use Policy for the user to read and accept or decline to follow its directives



**Note:** This button is configurable. Based on the configuration of the institution, this button may not be displayed.

- **Future Reservations:** Clicking this button displays the interface for reservations needed at a later time and or date.

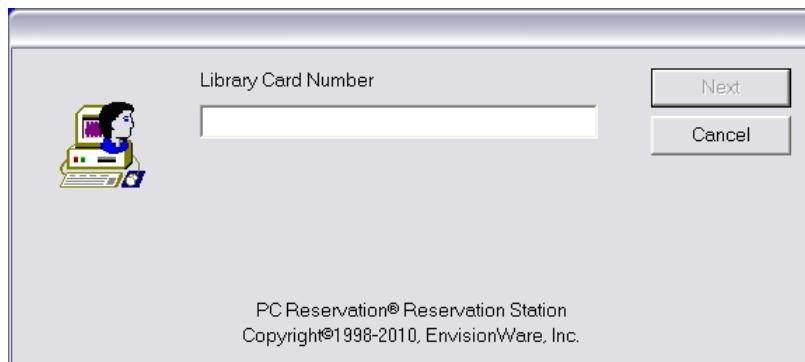


**Note:** This button is configurable. Based on the configuration of the institution, this button may not be displayed.

- **Envisionware:** Identifies the site name listed in the license file. In this example the license is an 'EnvisionWare' license. Your registered site name displays when your license runs the system.

3. Click **Next Available PC** button.

*The system then prompts for the **User ID** (the actual text depends upon how your system is configured).*



- The user may type the number via the keyboard or via a barcode scanner (if provided).
- If not authenticating/validating users, any entry is allowed in this control box.
- A pseudo authentication method allows you to enforce a number of digits and the starting alpha/digit match. Full authentication requires that the User's ID match an entry in either the ILS or the AAM database depending upon your configuration.

4. Enter your **User ID/Library Card Number** and click **Next**.

*The system displays the PIN screen.*



**Note:** This dialogue is configurable. Based on the configuration of the institution, this dialogue may not be displayed



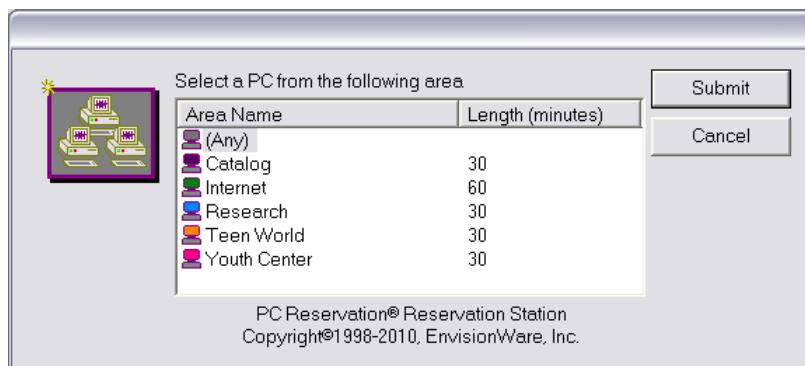
5. Enter your **PIN** and select **OK**.

- The PIN value may be entered via the keyboard or the onscreen keyboard.

*The system displays the 'Area Selection' dialogue.*



**Note:** This dialogue is configurable via the '**Reservation Station**' Tab on the Management Console and the configuration of **PC Areas**. Based on the configuration of the institution, this dialogue may not be displayed and all items may not appear.

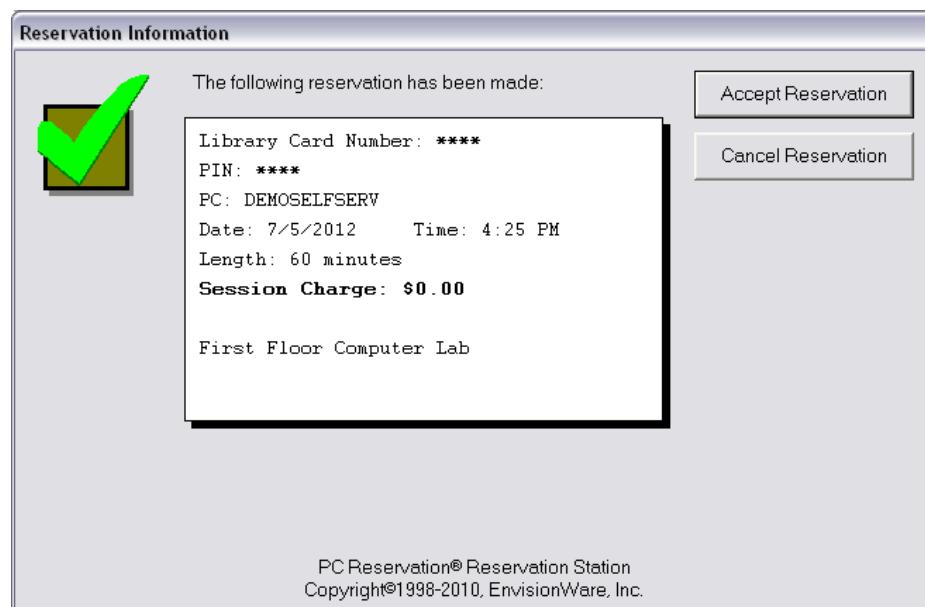


6. **Click** to highlight your desired area and click **Submit** to continue with the reservation process.

*The system displays the onscreen reservation confirmation screen.*



**Note:** This text on the on-screen confirmation is configurable. Based on the various configurations for this display of the institution, this dialogue may not include all items listed

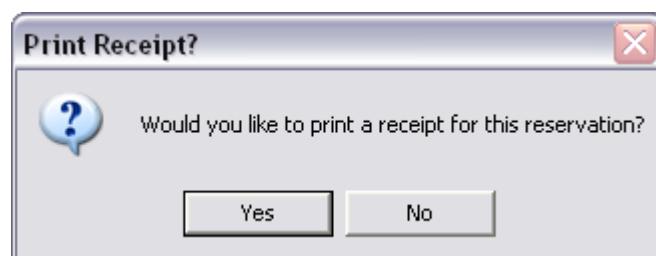


7. Click **Accept Reservation** to follow through with the reservation and reserve the computer. Otherwise, click **Cancel Reservation** to decline the reservation.

*The system displays a prompt to print a paper receipt.*



**Note:** This dialogue is configurable. Based on configurations of the institution, this dialogue may not display.



8. Click **Yes** to print the receipt. Otherwise, click **No** to decline printing a receipt.

*The system returns to the idle screen*

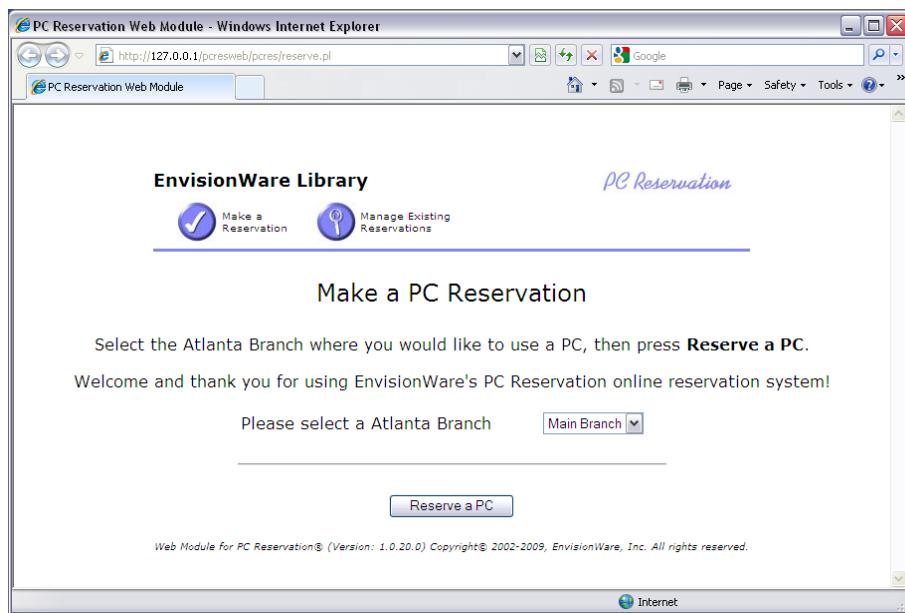
## Making a Reservation via the Web Module for Next Available PC

Users/Patrons may make reservations for computer use via the PC Reservation Web Module. This can be done from their home, via a smart phone, or any location remote from the facility as long as the user has internet access to the facility's hosted web page.

Complete the following to make a reservation from a PC Reservation Web Module for the next available computer:

1. Access the PC Reservation Web Module from any computer or device that has internet access.

*The system displays the PC Reservation Web Module.*

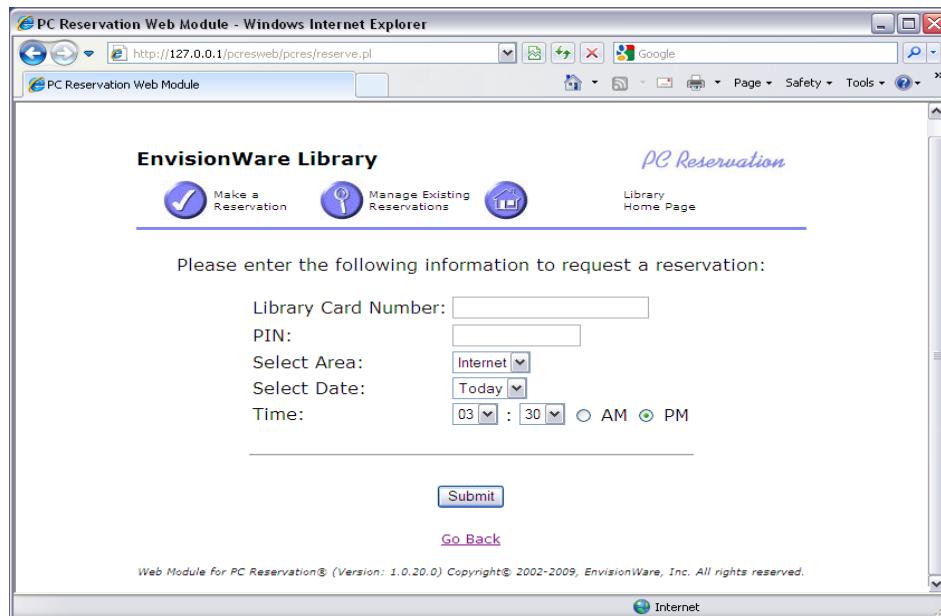


2. Select the 'Branch' location from the drop down menu.

*The system displays all branches in the list.*

3. Click 'Reserve PC'.

*The system displays the reservation window.*

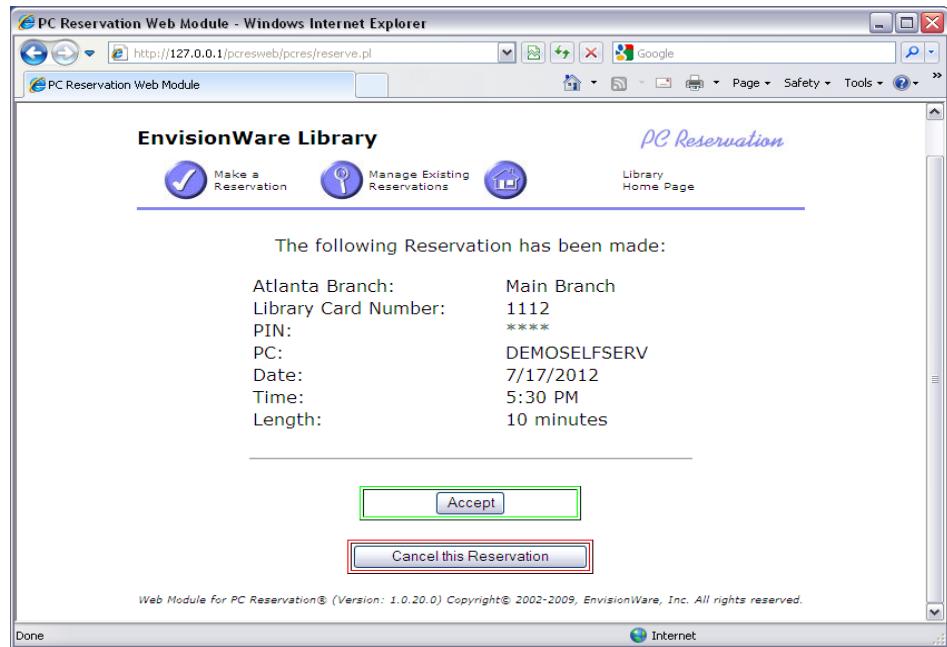


4. Provide values for the following items displayed via the reservation window:
  - **Library Card Number:** Accepts and displays the User/Patron unique user ID.
  - **PIN:** Accepts and displays the User/Patron PIN/Password.

 **Note:** This option is configurable. Based on the configuration of the institution, this option may not be displayed.

  - **Select Area:** Displays all configured areas and allows the user/patron to select the area of which they choose to reserve a computer.
  - **Select Date:** Displays either '**Today**' only or a range of dates if 'Future' reservations are configured.
  - **Time:** Displays the time in hours and minutes in two separate lists. Includes two radio buttons to enable selection of 'AM' time frame or 'PM'.
5. Click '**Submit**' to save your changes to the system for further processing.

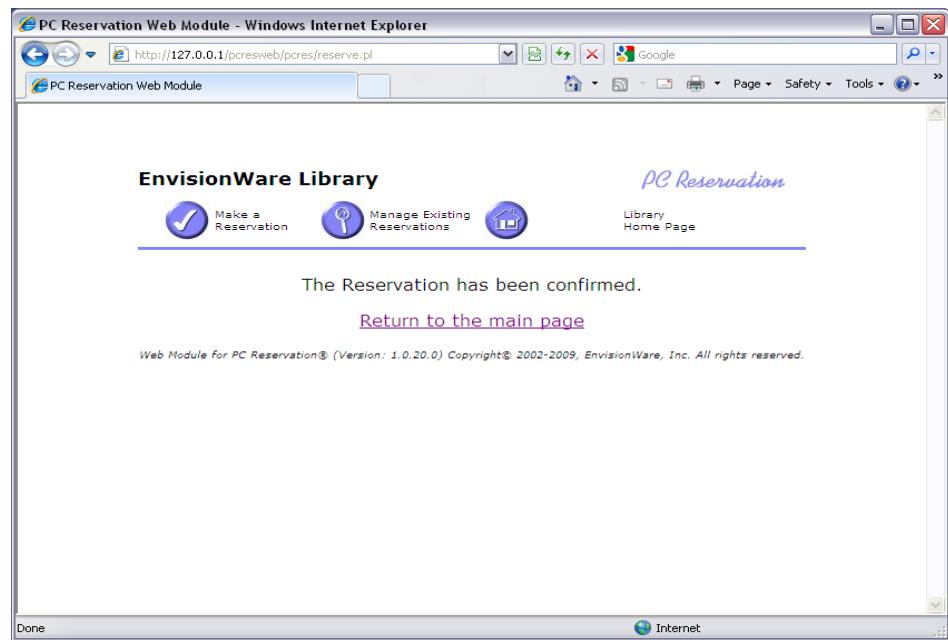
*The system displays an on-screen summary of the reservation made and requires the user to either accept or cancel the reservation.*



6. Ensure that you record your reservation details.
7. Choose to '**Accept**' the reservation from the following options:
  - Click Accept.
  - --OR--
  - Click Cancel this Reservation.

*The system prompts to verify if you really want to cancel the reservation.*

*The system displays a confirmation window that the reservation was successfully completed.*



## Making a Reservation via a Client Using @Client Reservations

Complete the following to make a reservation at a Client computer:

1. Go to a PC Reservation Client computer.

*The system displays the PC Reservation Client idle screen. The login screen may also possibly be on display if a very recent user/patron has completed their use of the computer.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently.

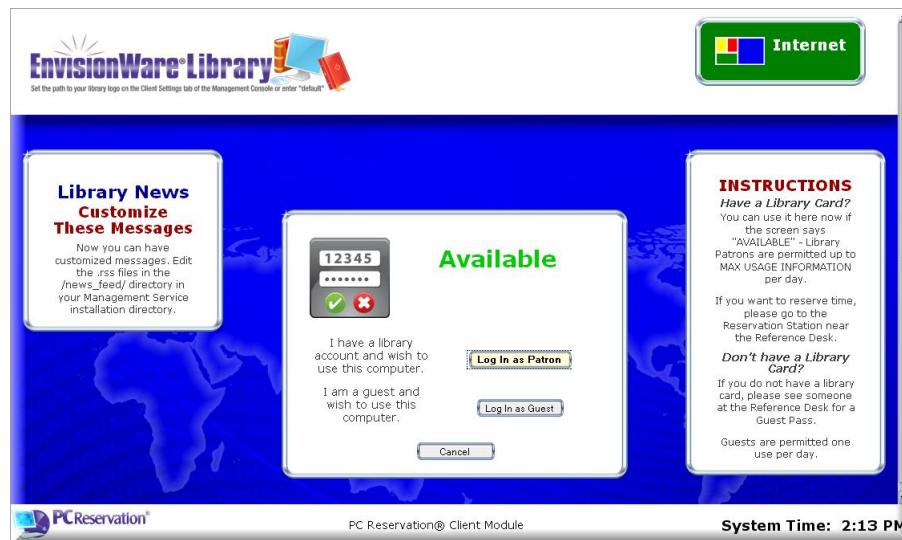


2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the Login window.*



**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option for Guest Users.



3. Click 'Log In as Patron'.

*The system displays the screen which requests the user to enter his or her credentials.*



**Note:** The request for credentials screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option to enter both the User ID and PIN.



4. Enter your credentials (Library Card Number & PIN) as requested.
5. Click the 'Log In' button to access computer use.

*The system displays the confirmation screen.*



**Note:** If the system is not configured to use Validation the 'Session Charge' label is not visible.



6. Click **Confirm**.

*The system directs the user to an active PC Reservation session. The 'Welcome' screen is displayed. The user can click OK to clear this message from the Control Menu.*

## Trading a Future Reservation for a Reservation Now at the Client

PC Reservation has the capability of ensuring that users/patrons have every opportunity to use computers. When the system is configured to do so, users/patrons have the opportunity to use the computer now rather than wait until their scheduled reservation, if the computer is available. Normally, this scenario happens when there is time available on a computer after a user/patron either closed his or her session early or cancelled the reservation.

When users/patrons choose to trade their existing future reservation for a turn on the computer now, the following applies:

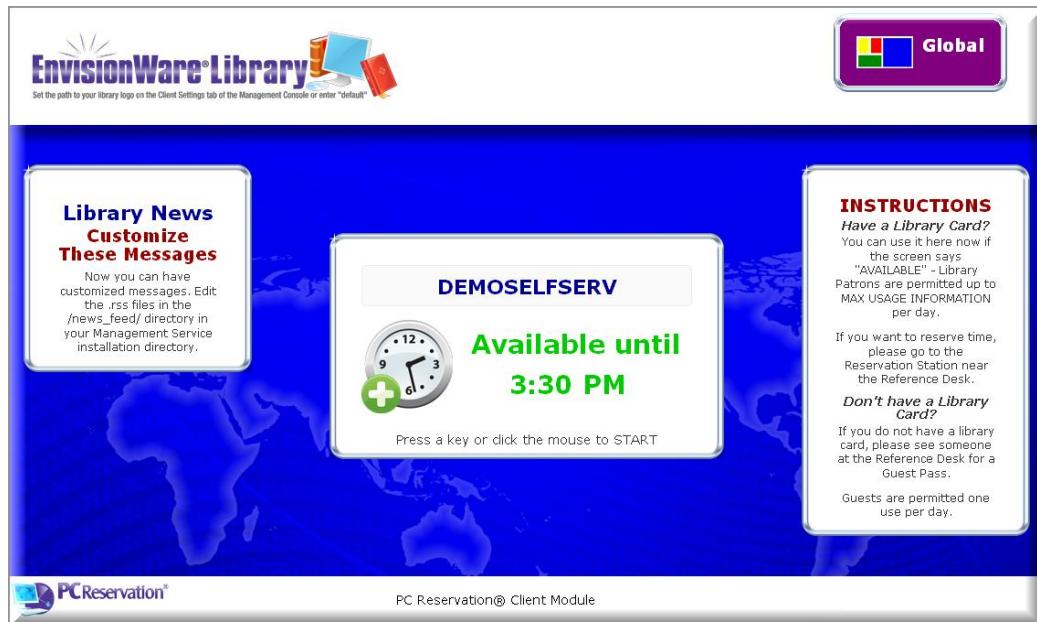
- Their original reservation is automatically cancelled.
- The current reservation's total session time may be less than the amount of time which was scheduled for the future reservation when 'Short' sessions are configured.

We assume the following is completed.

- User ID '1114' has made a future reservation from a reservation station for 3:30 pm.
- The computer is booked for all time slots prior to the reservation for user '1114'.
- The user which was logged into a session has ended his or her session and the computer now has some availability.

Complete the following steps to trade a 'Future Reservation' for a reservation now:

1. User '1114' goes to the designated PC Reservation Client computer and realizes the computer now has availability.



2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the screen which allows the user to identify if they are the owner of the next reservation or another user.*

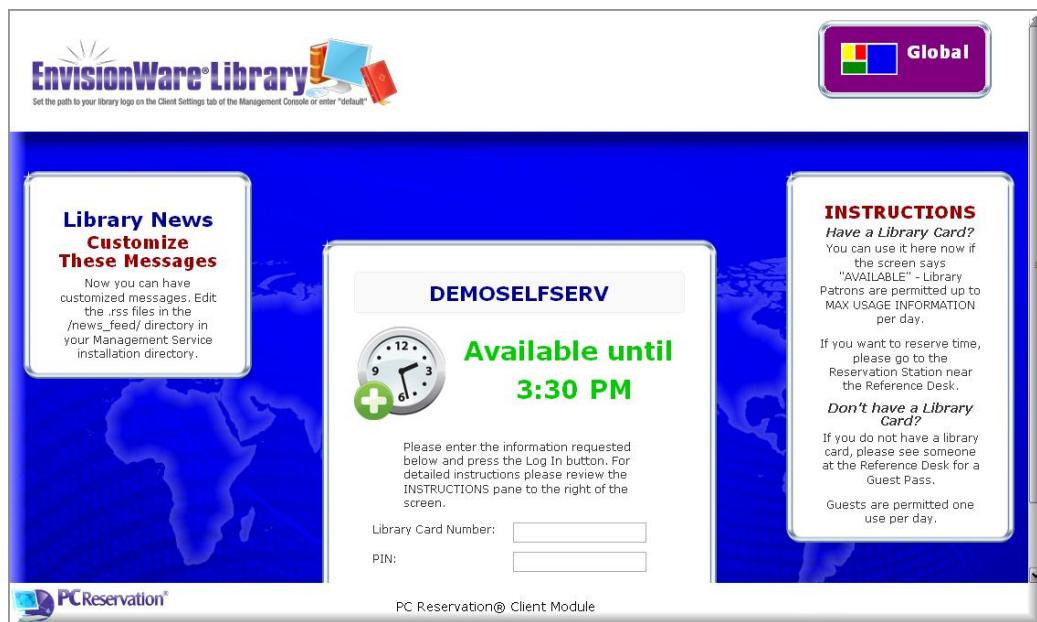


3. Click the 'Use Now' button. User '1114' will not click the 'Log In' button because that button is intended for the user who has the next reservation.

*The system displays the Login Screen.*

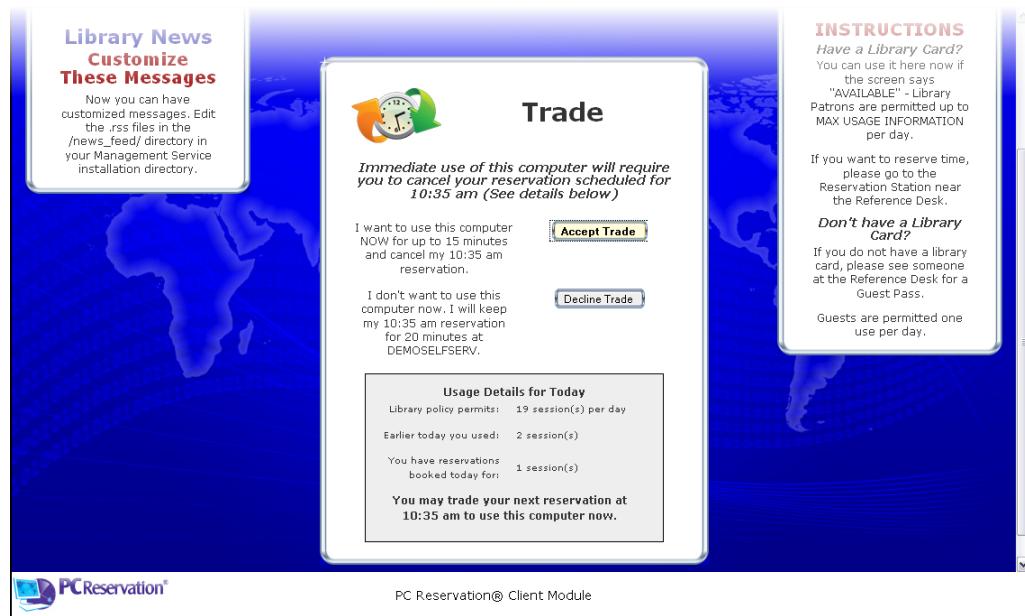


**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently.



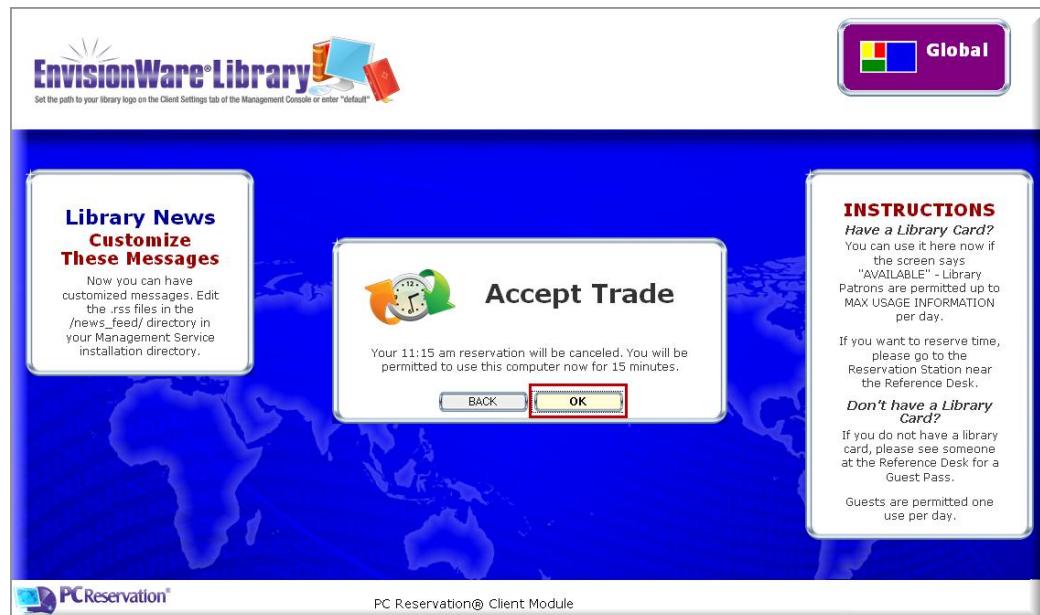
4. Enter your credentials (Library Card Number & PIN) as requested.
5. Click the 'Log In' button to access the computer now.

*The system displays the '**Trade**' screen. This screen is self explanatory. Users should pay attention to the verbiage to ensure they make a desired and informed choice.*



6. Click to '**Accept Trade**' option.

*The system displays a screen to confirm that the user does want to go through with the Trade reservation.*



7. Click '**OK**' to confirm that you understand your later reservation will be cancelled and you will be provided access to the computer now.

*The system displays the Computer Use Policy.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently or it may not appear at all.

### Use Policy Guidelines

Per this Computer Use Policy you are obligated to adhere to the guidelines outlined below. Violations to this policy will result in a block being placed on your patron record.

- 1) Do not visit questionable sites
- 2) Do not share your user number with others to gain computer use access
- 3) Do not install items to the computer
- 4) Do not reboot the computer
- 5) Do not download documents to the computer
- 6) Do not eat or drink while at the computer
- 7) Respect your user and do not disturb the person sitting next to your station

Thank you! We appreciate your cooperation. Happy surfing!



PC Reservation® Client Module

8. Click 'Accept' to access the computer.

*The system opens a session and displays the welcome window above the Control Menu.*



9. Click 'OK' to close the Welcome window and begin using the computer.

*The system closes the window and displays the full desktop.*

## Trading a Reservation at the Self-Service Reservation Station

PC Reservation has the capability of ensuring that users/patrons have every opportunity to use computers. When the system is configured to do so, users/patrons have the opportunity to trade an existing future reservation for the Next Available PC.

When users/patrons choose to trade their existing future reservation for a turn on the computer now, the following applies:

- The system is configured so that concurrent reservations are not allowed.
- If concurrent reservations are allowed, this same scenario exists if the user does not have enough sessions/time remaining to hold both reservations.
- The system is configured to allow users/patrons to cancel existing reservations if denied due to Use restrictions.

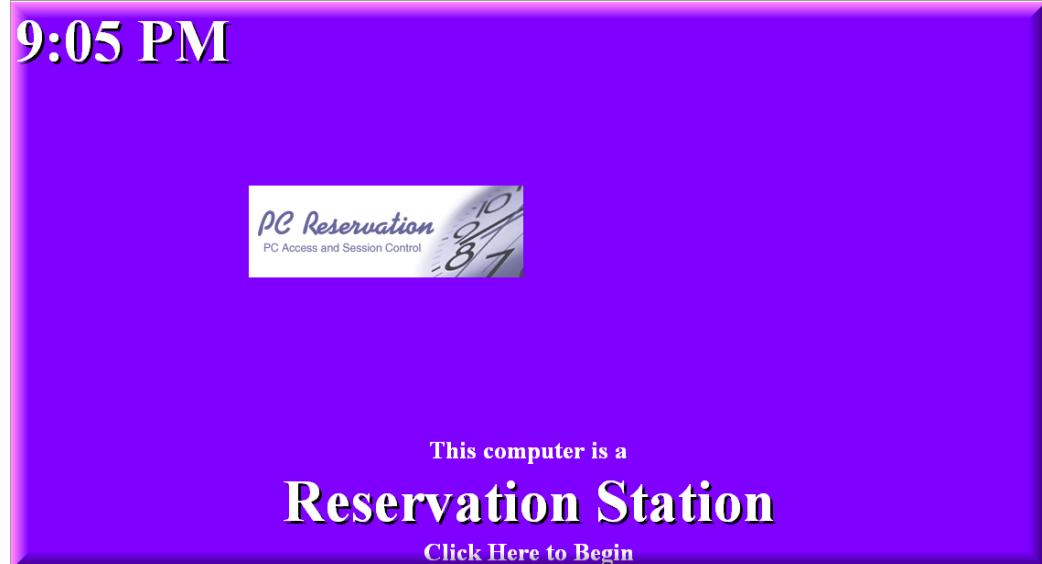
We assume the following is completed.

- User ID '1111' has made a future reservation.

Complete the following steps to trade a 'Future Reservation' for the Next Available PC:

1. Go to a Self-Service Reservation Station.

*The system displays the idle screen on the reservation station.*

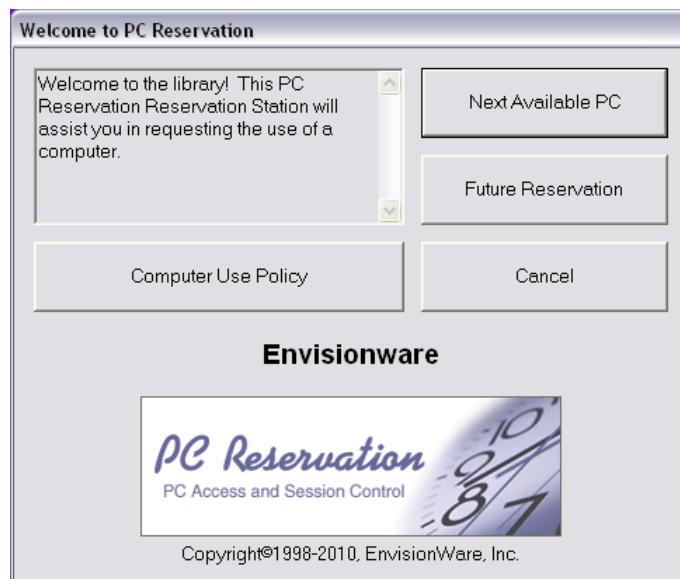


2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the login screen.*

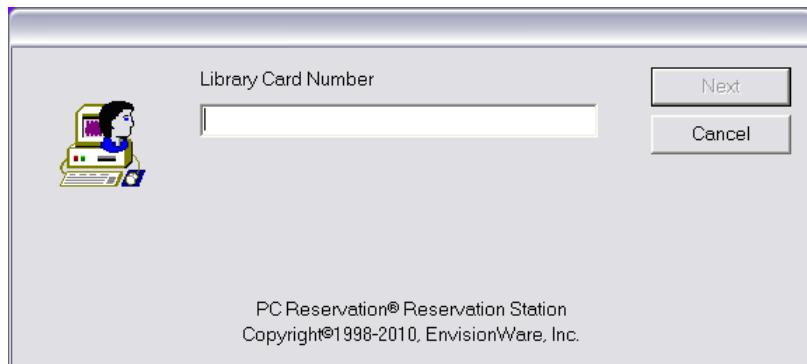


**Note:** The screen is configurable. Based on the configuration of the institution, this display may appear differently.



3. Click the 'Next Available PC' button.

*The system displays the User ID request screen.*



4. Enter your credentials as requested.
5. Click the '**Next**' button to access the computer continue.

*The system displays the PIN request screen.*

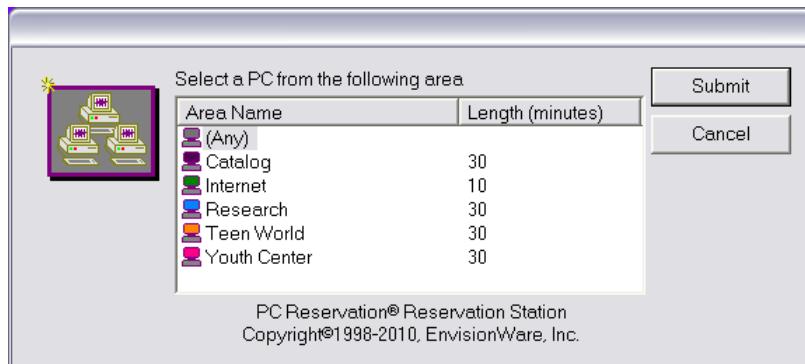


**Note:** The screen is configurable. Based on the configuration of the institution, this display may not appear.



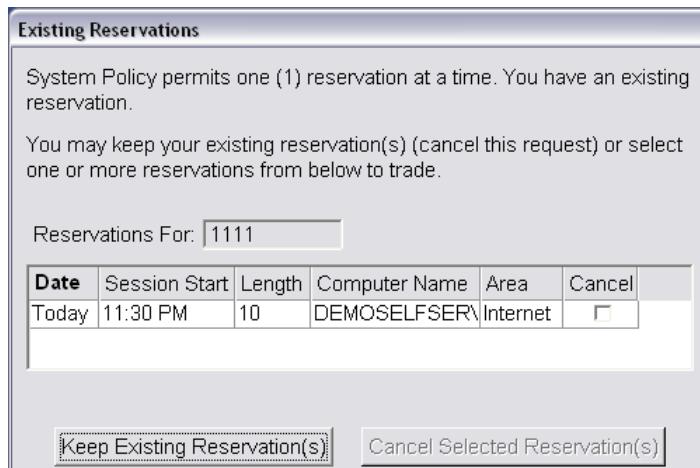
6. Enter your **PIN** and click **OK**.

*The system displays the PC Area screen.*



7. Select the area of choice and click the **Submit** button.

*The system processes the request to search for availability. The system then displays an offer to trade reservations because it has found that the user has a pending future reservation and concurrent reservations are not allowed.*



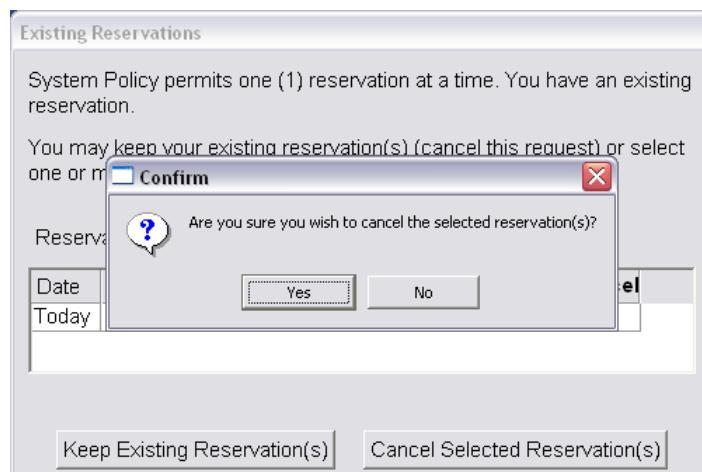
8. Click the '**Cancel**' checkbox to cancel the pending future reservation and trade with the Next Available PC.

*The system enables the cancel button.*



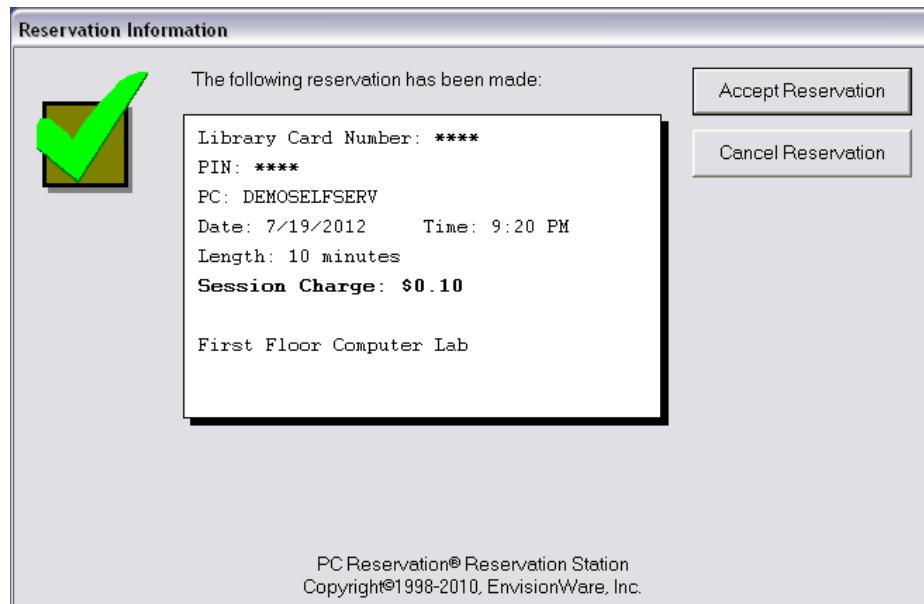
9. Click **Cancel Selected Reservation(s)** to follow through with the cancellation in order to trade for the Next Available PC.

*The system prompts to ensure the user wants to cancel the reservation in order to trade for the Next Available PC.*



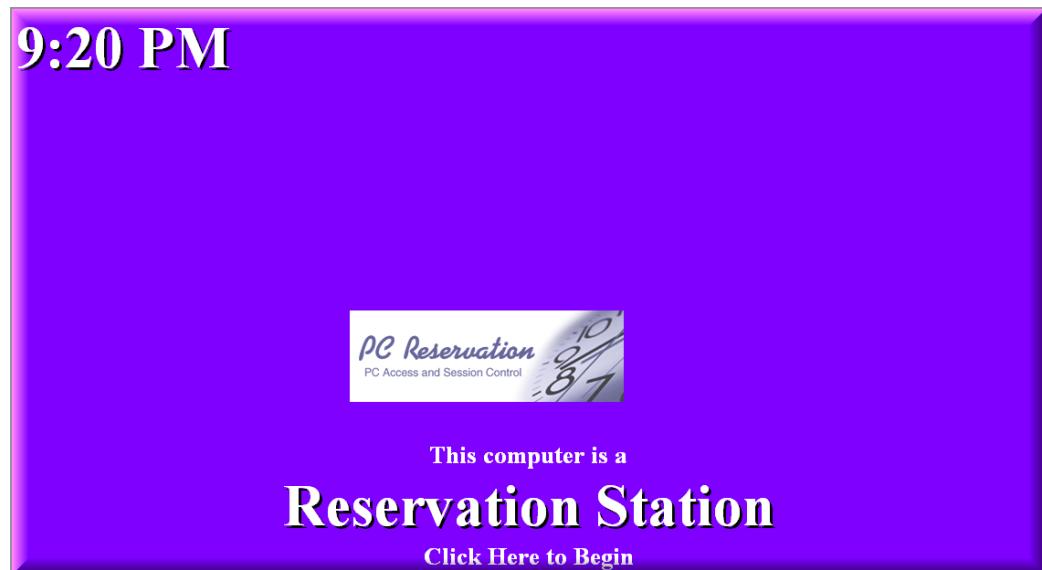
10. Click to 'Yes' to confirm your request.

*The system displays performs validation on the user and locates the computer that suites the reservation request details for a Next Available PC. Then it displays the on-screen reservation summary and final confirmation.*



11. Click the '**Accept Reservation**' button to complete the reservation process.

*The system returns to the Self-Service Reservation Station Idle Screen.*



## Signing Into an Available Short Session Now

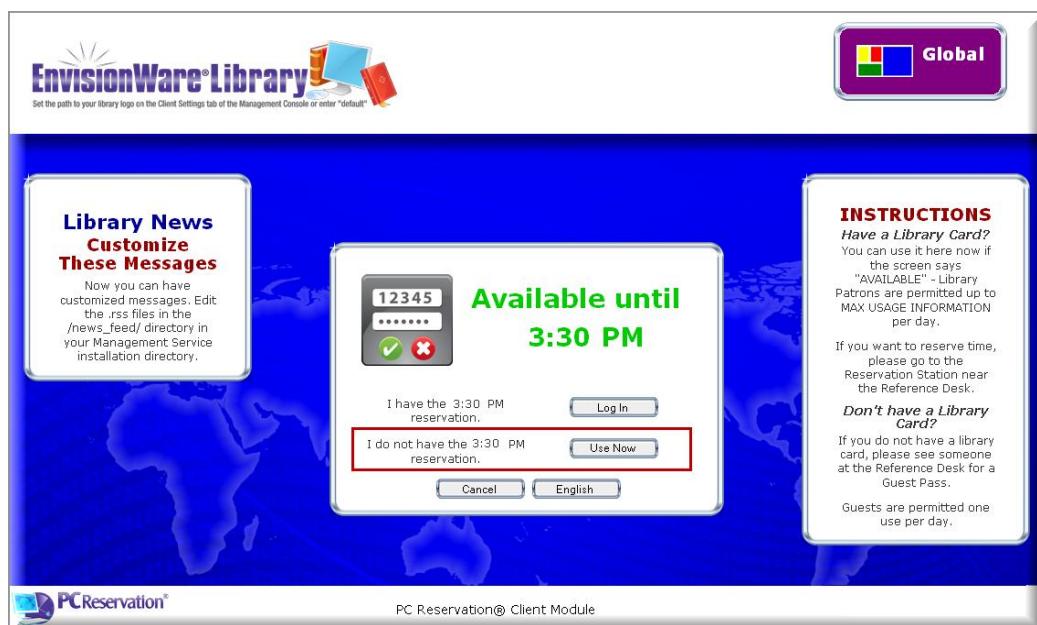
PC Reservation has the capability of ensuring that users/patrons have every opportunity to access computers. When the system is configured to allow 'Short Sessions', users/patrons may use the computer for a time that is less than a full session based on availability.

Complete the following steps to use a Short Session now.

See the following scenario:

- User 'A' is logged into a session on the PC Reservation Client. User 'A' signs out of the session early. There is now availability on the computer before the next pending reservation.
- User 'B' approaches the computer realizing that there is now availability on the computer. User 'B' should follow the instructions beginning in item 2 below.

1. Press any key, click, or move the mouse to invoke the Login screen.



2. Click the 'Use Now' button. The user/patron will not click the 'Log In' button because that button is intended for the user who has the next reservation.

*The system displays the screen allowing the user/patron to identify whether logging in as Guest or Valid User/Patron.*

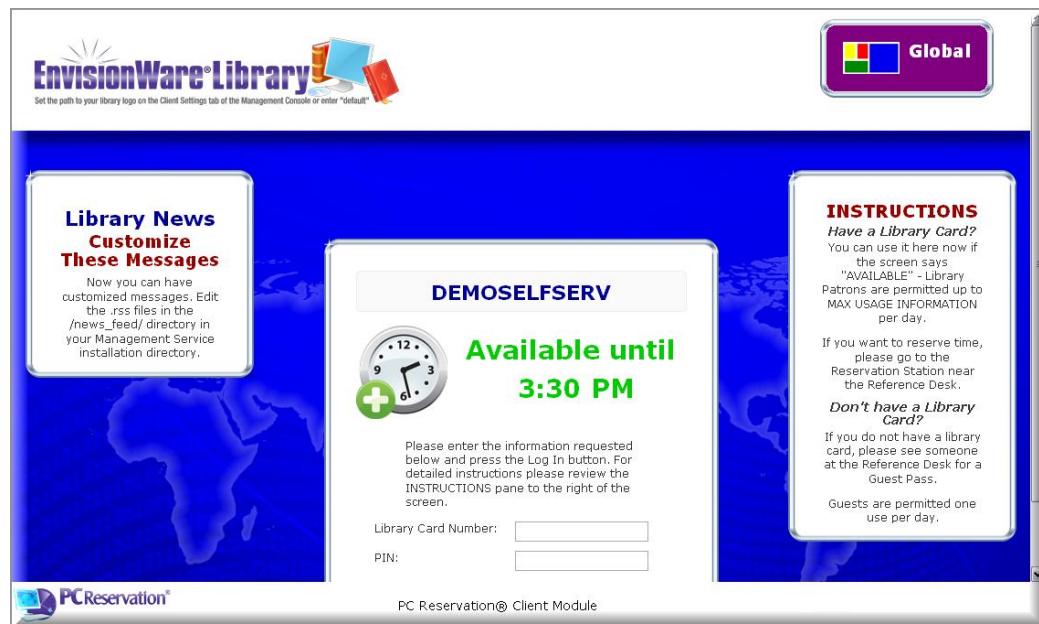


3. Click 'Log In as Patron'.

*The system displays the Login Screen.*



**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently.



4. Enter your credentials (Library Card Number & PIN) as requested.
5. Click the 'Log In' button to access the computer now.

*The system displays the confirmation screen.*



**Note:** If the system is not configured to use Validation the 'Session Charge' label is not visible.



6. Click Confirm to use the computer.

*The system directs the User to an active PC Reservation session. The Computer User Policy is encountered and accepted by the user/patron. The 'Welcome' screen is displayed within the session. The user can click OK to clear this message from the Control Menu.*

## Signing Into a Session Reserved from a Reservation Station

Patrons/Users can make reservations for computer use via the PC Reservation Client or a reservation station (Staff or Self-Service).

See the following instances where a user would have to make a reservation via the Reservation Station or from a Staff station:

- @Client Reservations is not Enabled on the system
- No computers are available...
- Other instances are dictated by the Use Policy at the facility

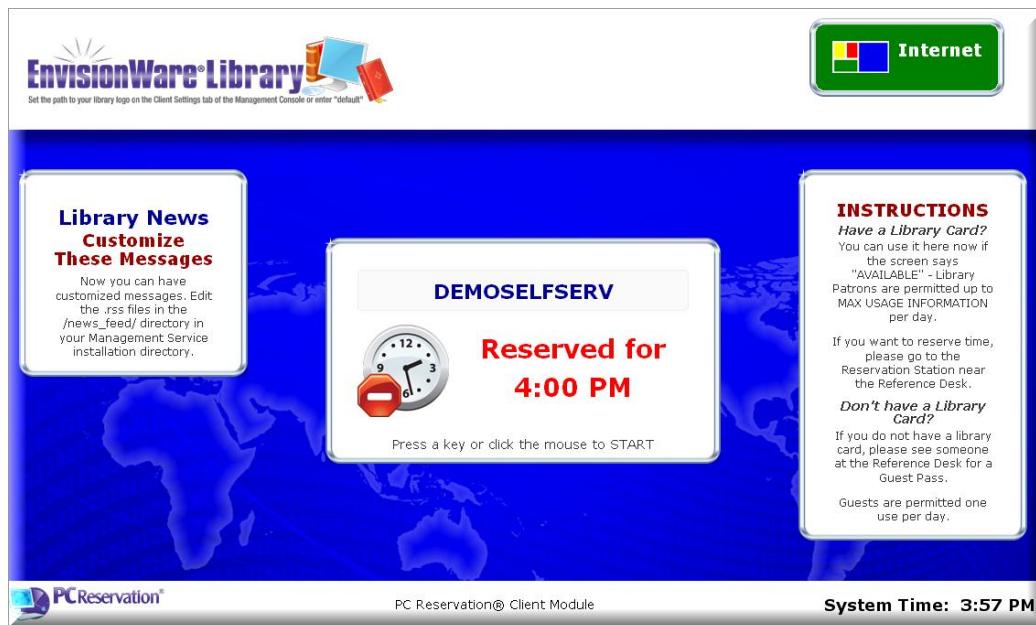
Complete the following to sign into a Client session after making a reservation via the Self-Service Reservation Station or a Staff Station:

1. Go to the computer for which you received a reservation.

*The system displays the PC Reservation Client idle screen on the Client. The login screen may also possibly be on display if a very recent user/patron has completed their use of the computer.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently.

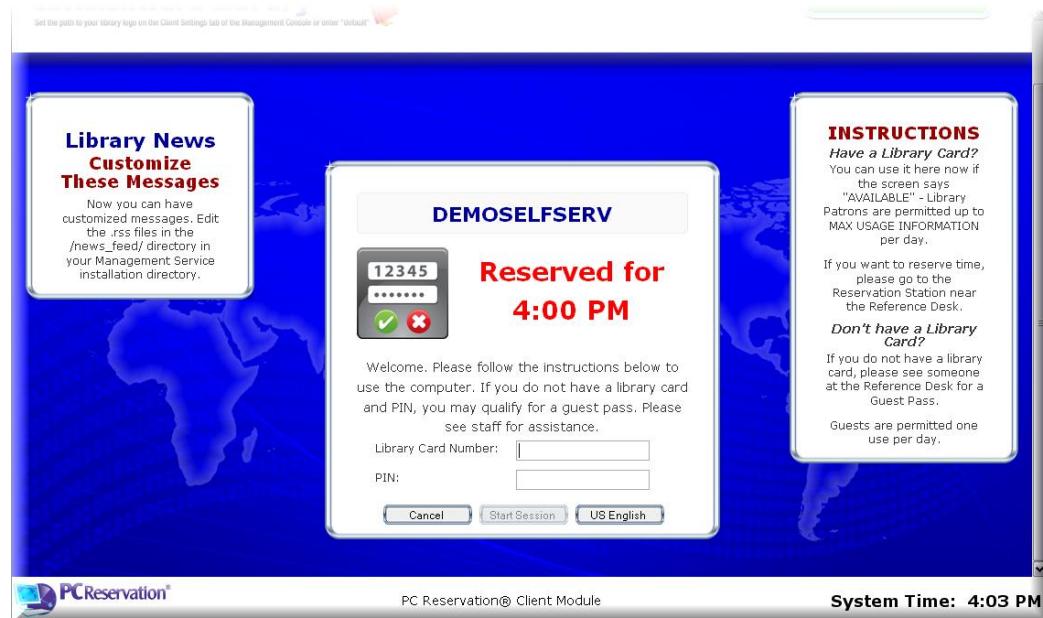


2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the Login window.*



**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option for Guest Users.

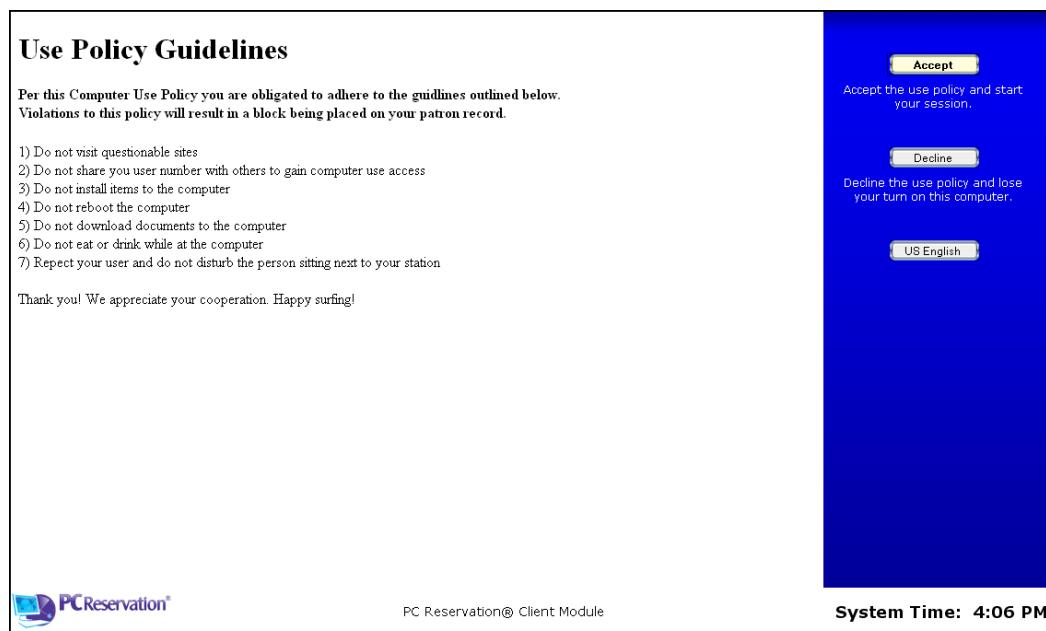


3. Enter the credentials (Library Card Number & PIN) used when making the reservation.
4. Click the **Start Session** button to access computer use.

*The system displays the Computer Use Policy Page.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently or it may not appear at all.



5. Click 'Accept' to access the computer.

*The system opens a session and displays the welcome window above the Control Menu.*



6. Click 'OK' to close the Welcome window and begin using the computer.

*The system closes the window and displays the full desktop.*

## Signing Into a Session for an Early Login at the PC Reservation Client

Early Login is a subtle feature. When the Management Console is configured to allow users/patrons to login to a reservation early, the user simply provides his or her credentials (based on system configuration requirements) and the PC Reservation Client allows access, as long as there is availability to support the early logon.

## Signing Into a Session when Using a Specified User Prefixes

PC Reservation allows the system to be configured to insert and automatic prefix before all User IDs being validated by PC Reservation.

Complete the following steps to log into a session using a User ID used with a static prefix:

1. Go to a PC Reservation Client computer.

*The system displays the PC Reservation Client idle screen. The login screen may also possibly be on display if a very recent user/patron has completed their use of the computer.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently.

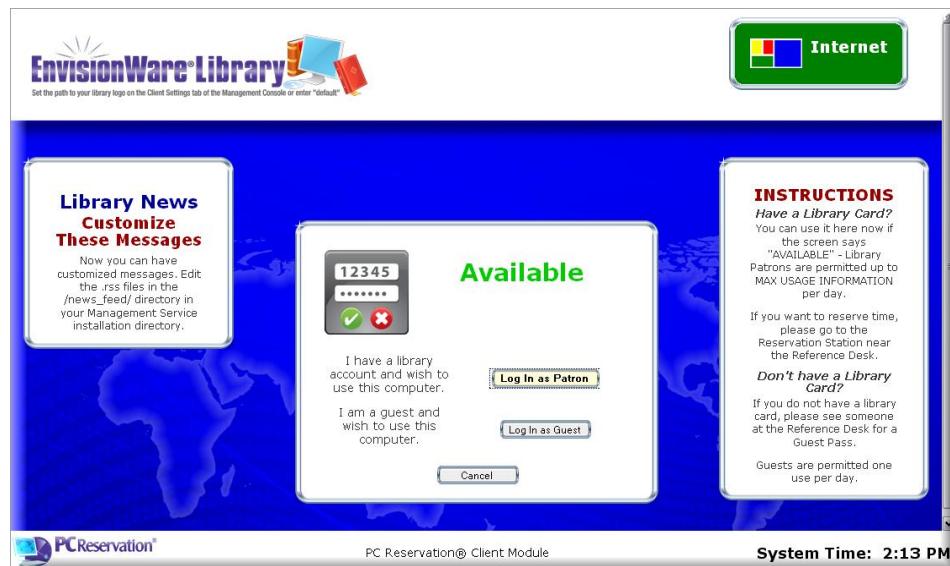


2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the Login window.*



**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option for Guest Users.

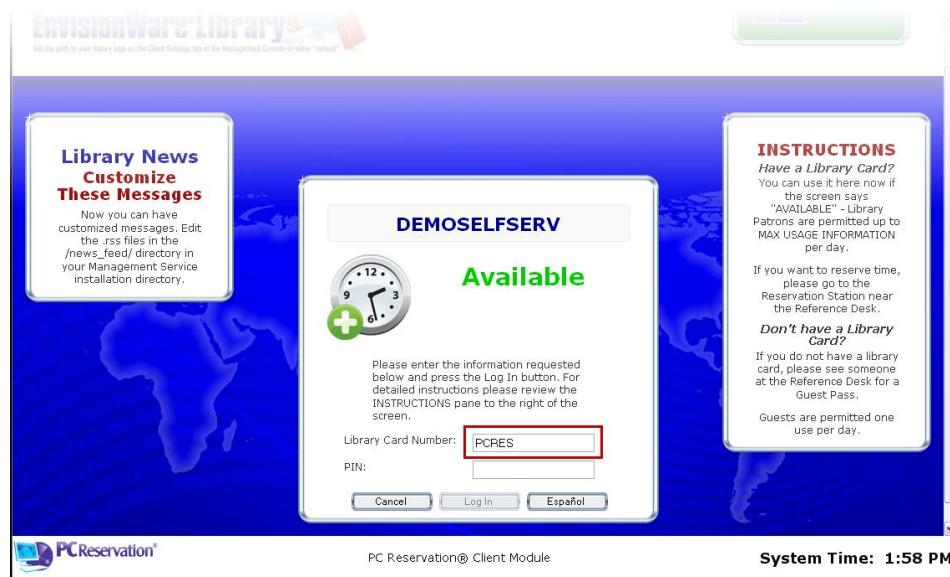


**3. Click 'Log In as Patron'.**

*The system displays the screen which requests the user to enter his or her credentials. Additionally, you will find that the prefix has populated the text box.*



**Note:** The request for credentials screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option to enter both the User ID and PIN.



10. Enter your credentials (Library Card Number & PIN) as requested.
4. Click the 'Log In' button to access computer use.

*The system displays the confirmation screen.*



**Note:** If the system is not configured to use Validation the 'Session Charge' label is not visible.



5. Click **Confirm**.

*The system directs the user to an active PC Reservation session. The 'Welcome' screen is displayed. The user can click OK to clear this message from the Control Menu.*

## Accepting a Computer Use Policy

When the system is configured to require acceptance of a '**Use Policy**', in order to access the computer, the user/patron are required to 'Accept' the guidelines specified in the policy agreement displayed.

Complete the following to 'Accept' the Computer Use Policy guidelines displayed before entering a session:

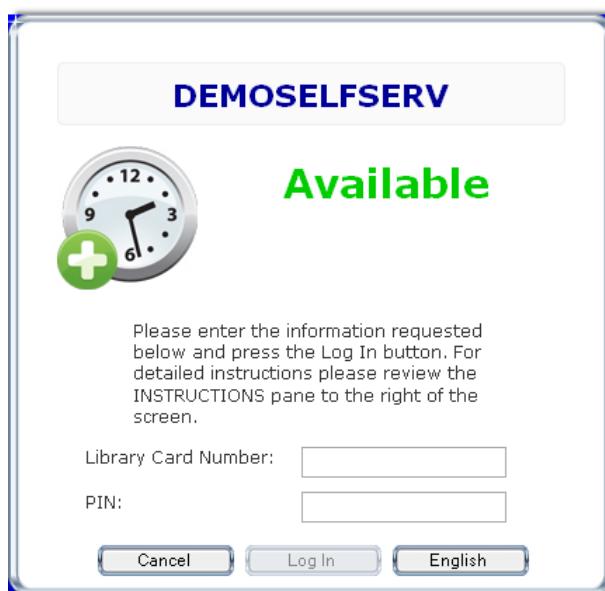
1. Go to a PC Reservation V4 Client and view the login screen.
2. Press any key, click, or move the mouse to display the Status Window.

*The system displays the status window.*



3. Click '**Log In as Patron**'.

*The system displays the 'Login Window'.*



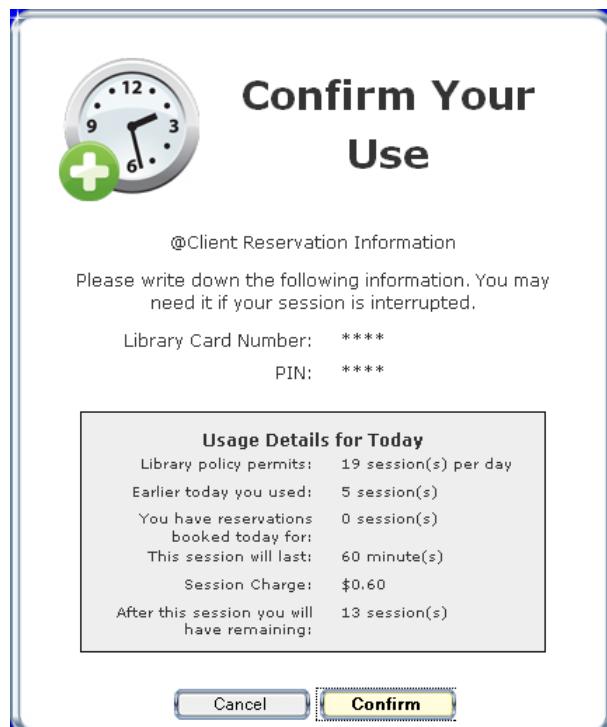
4. Enter the '**Library Card Number**' and '**PIN**'.



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently and may not include all options.

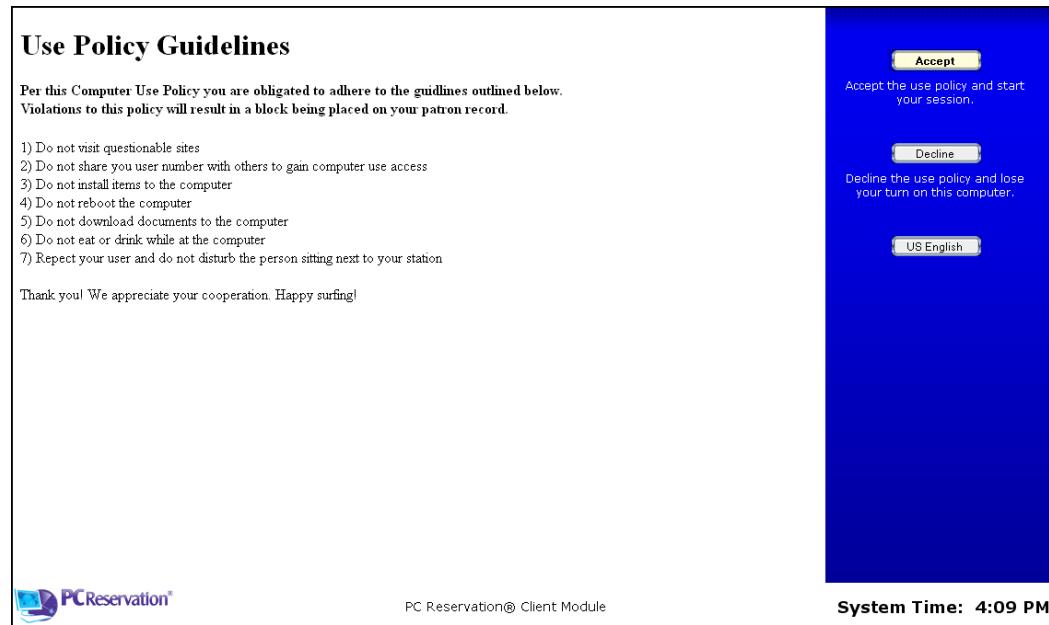
5. Click '**Log In**'.

*The system displays the reservation confirmation screen.*



6. Click '**Confirm**'.

*The system displays the 'Computer Use Policy' Screen.*



7. Click the 'Accept' button. When this button is selected it represents that the user/patron agrees with the guidelines displayed in the policy.

*The system starts a session and displays the PC Reservation Control Menu in a user session.*



## Declining a Computer Use Policy

When the system is configured to require acceptance of a 'Use Policy', in order to access the computer, the user/patron are required to 'Accept' the guidelines specified in the policy agreement displayed. If the user/patron chooses to decline agreement to this policy, the system can be configured for one of the following:

- End the Session
- No Internet Access
- Apply the Internet Filter

Complete the following to 'Decline' the Computer Use Policy guidelines:

1. Go to a PC Reservation V4 Client and view the login screen.
2. Press any key, click, or move the mouse to display the Status Window.

*The system displays the status window.*



3. Click 'Log In as Patron'.

*The system displays the 'Login Window'.*



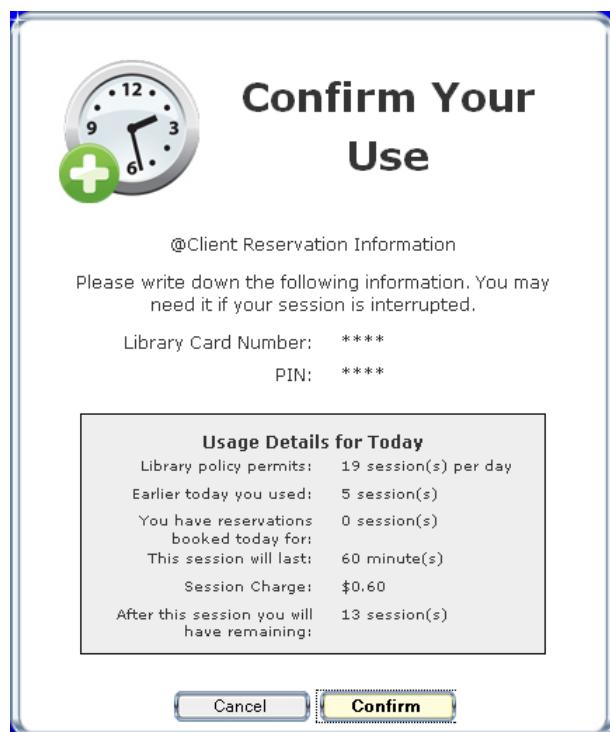
4. Enter the '**Library Card Number**' and '**PIN**'.



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently and may not include all options.

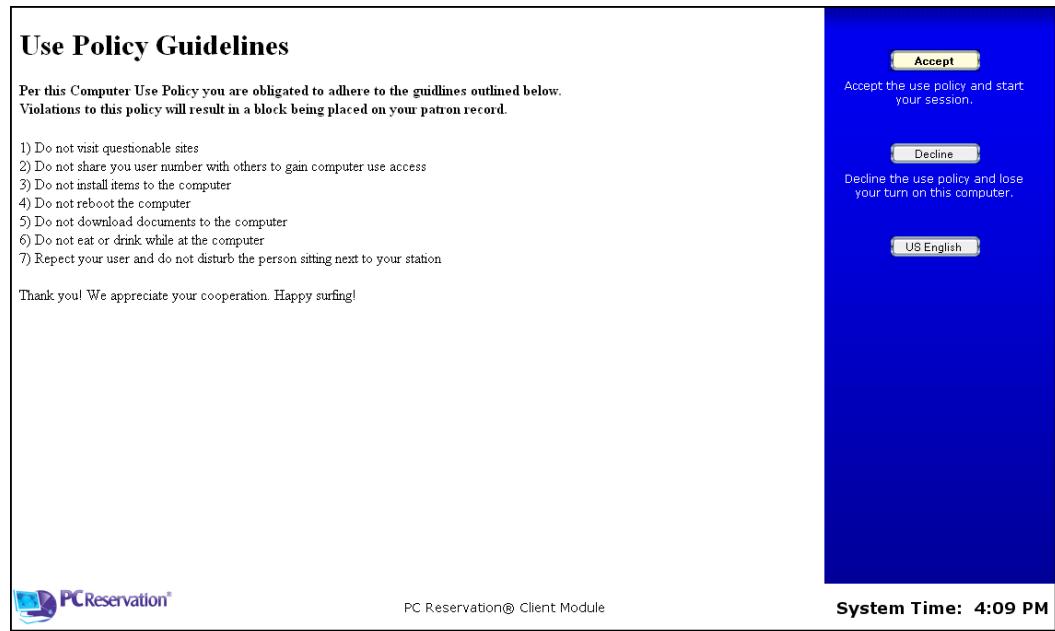
5. Click '**Log In**'.

*The system displays the reservation confirmation screen.*



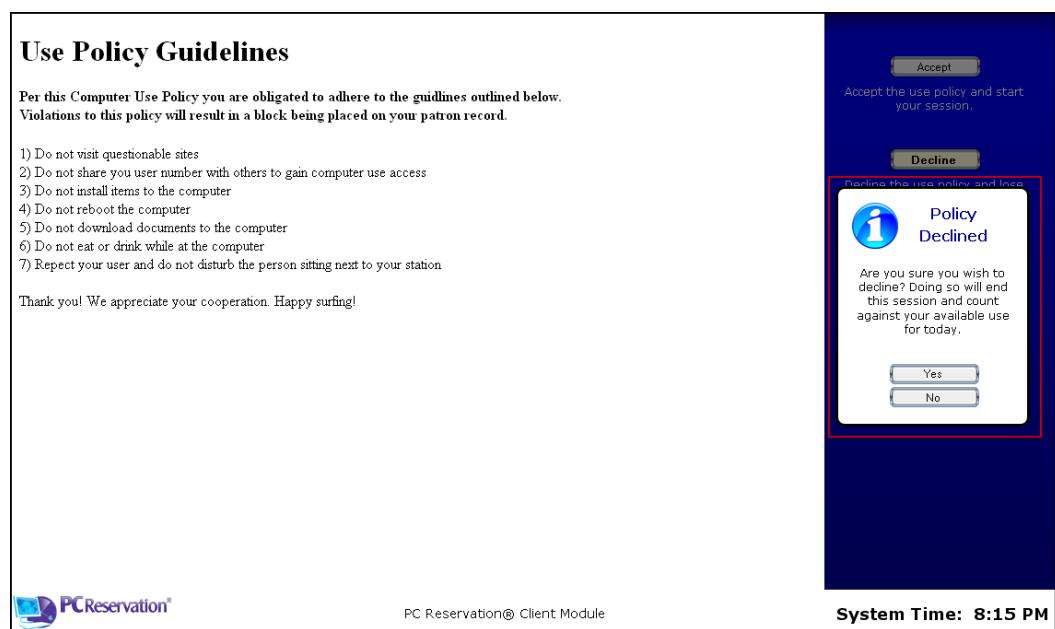
6. Click '**Confirm**'.

*The system displays the 'Computer Use Policy' Screen.*



7. Click the '**Decline**' button. When this button is selected it represents that the user/patron agrees with the guidelines displayed in the policy.

*The system displays a message to ensure the user is aware that they will lose their turn should they decline the policy.*



8. Click 'Yes'.

*The system returns to the PC Reservation Status/Idle screen.*



## Bypassing the Computer Use Policy when Resuming 'On-Hold' Session

Sessions that are interrupted attain an **On-Hold** status. This status occurs when a user's session is interrupted due to a power outage, loss of network connectivity, etc. Basically anything that causes the PC Reservation Client to close unexpectedly and improperly is recognized as an interrupted session and invokes the **On-Hold** status.

When the system is configured to require acceptance of a '**Use Policy**', in order to access the computer, the user/patron does not have to accept the policy guidelines a second time when resuming a session that has an 'On-Hold' status. The PC Reservation Client stores the user's initial acceptance of the policy in memory. The Client then checks for this value when the session is resumed.

This 'Bypass' behavior is not configurable. It is available by default for any PC Reservation session resuming an 'On-Hold' session.

Complete the following to log back into your interrupted session when configured for a Use Policy:

1. Note the PC Reservation Client holds an **On-Hold** status because it was shutdown improperly thereby interrupting the session.



2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the Login window.*



**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include all options and features, such as a request of ID and PIN.



3. Enter your credentials (Library Card Number & PIN) as requested.
4. Click '**Start Session**'.

*The system returns the user back to the desktop of his or her PC Reservation session.*

*The Management Service saves the users initial response to the Computer Use Policy. This user responds to the Computer Use Policy once and is not required to accept the policy a second time if the session is interrupted improperly.*

## Selecting and Changing the Session Language

Users can translate the PC Reservation Client interface, when configured, at four different points of the login process. See the following list:

- Via the Status Window
- Via the Login Window
- Via the Computer Use Policy Acceptance Screen
- Via the 'Control Menu' in an Active Session

### Change the Language via the Status Window

Complete the following steps to select your language translation from the Status Window:

1. Go to a PC Reservation V4 Client.
2. Press any key, click, or move the mouse to display the Status Window.

*The system displays the status window.*



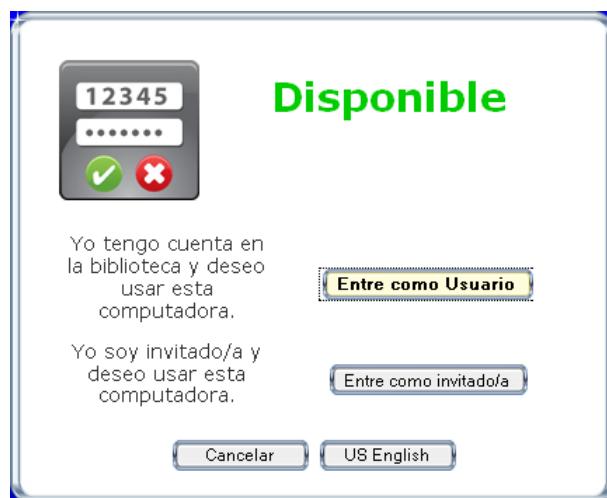
3. Click the language button.

*The system displays all configured languages.*



4. Click the language link of choice.

*The system changes the language to display the Status Window in the chosen language. From this point and into the session, the PC Reservation user interface reflects the selected language translation.*



5. Continue until you are logged into a session.

*The system displays the PC Reservation Control Menu in the selected language.*



## Change the Language via the Login Window

Complete the following steps to select your language translation from the Login Window:

1. Go to a PC Reservation V4 Client and view the login screen.
2. Press any key, click, or move the mouse to display the Status Window.

*The system displays the status window.*



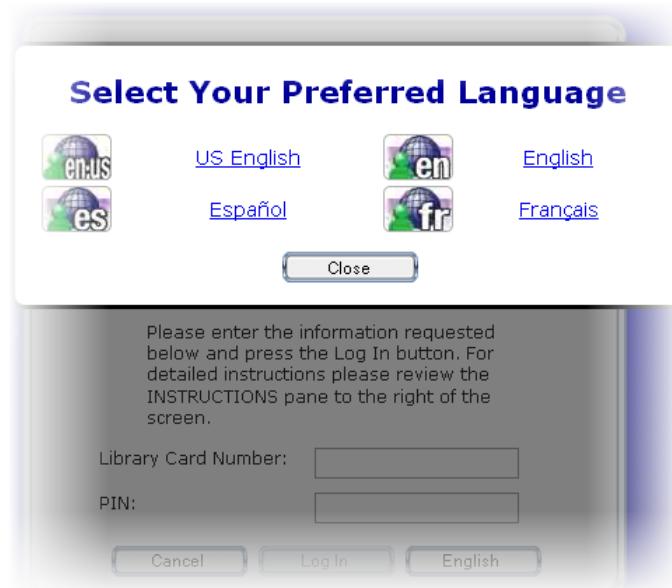
3. Click 'Log In as Patron'.

*The system displays the 'Login Window'.*



4. Click the language button.

*The system displays all language options.*



5. Click the language link of choice.

*The system changes the language to display the Login Window in the chosen language. From this point and into the session, the PC Reservation user interface reflects the selected language translation.*



6. Continue until you are logged into a session.

*The system displays the PC Reservation Control Menu in the selected language.*



## Change the Language via the Computer Use Policy Acceptance Screen

Complete the following steps to select your language translation from the Computer Use Policy Acceptance Screen:

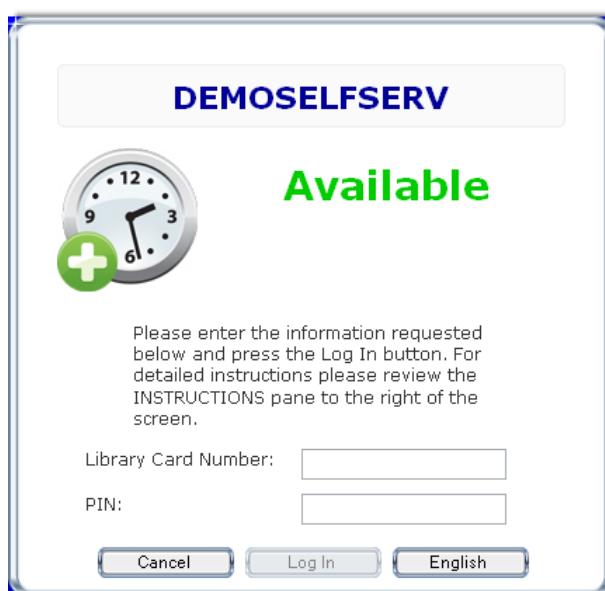
1. Go to a PC Reservation V4 Client and view the login screen.
2. Press any key, click, or move the mouse to display the Status Window.

*The system displays the status window.*



3. Click 'Log In as Patron'.

*The system displays the 'Login Window'.*



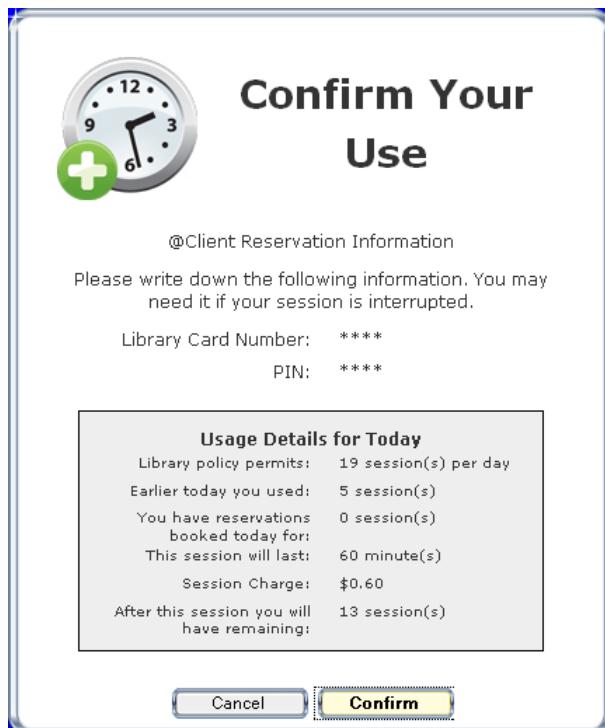
4. Enter the 'Library Card Number' and 'PIN'.



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently and may not include all options.

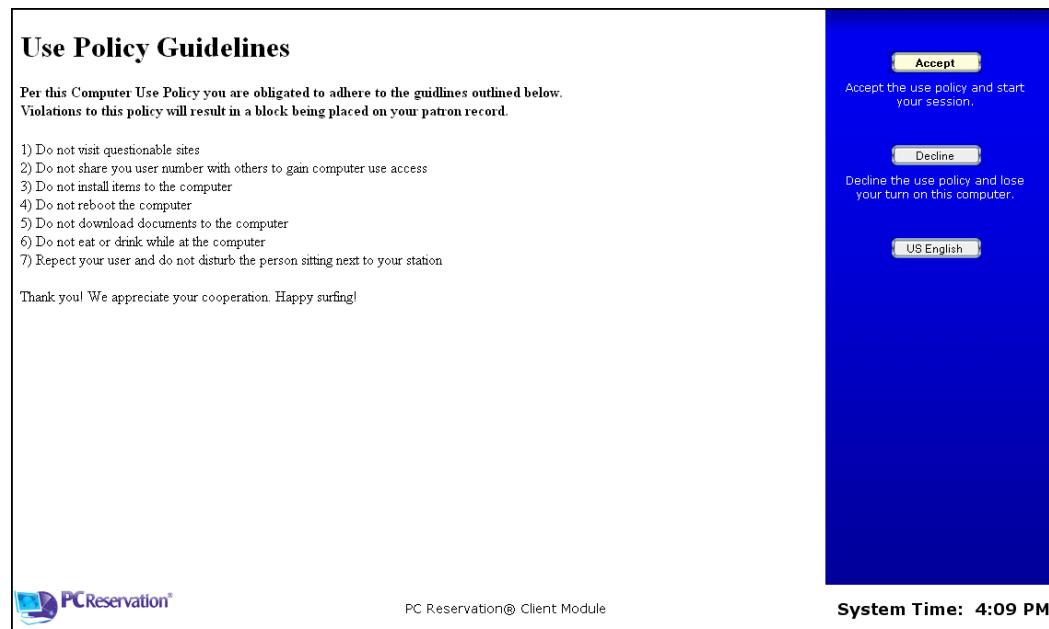
5. Click '**Log In**'.

*The system displays the reservation confirmation screen.*



6. Click '**Confirm**'.

*The system displays the 'Computer Use Policy' Screen.*



**Use Policy Guidelines**

Per this Computer Use Policy you are obligated to adhere to the guidelines outlined below. Violations to this policy will result in a block being placed on your patron record.

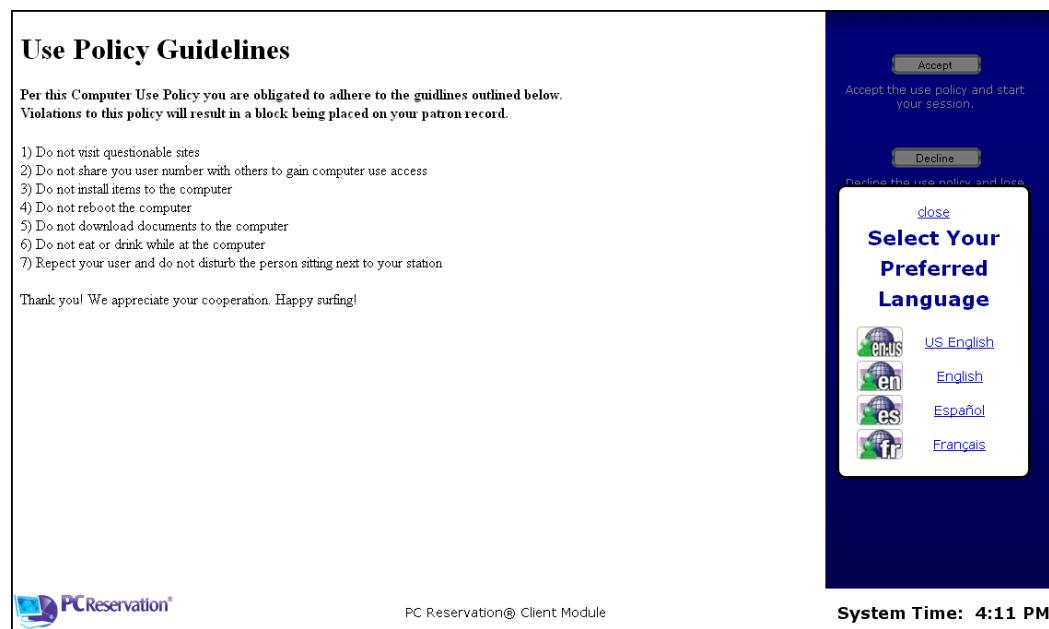
- 1) Do not visit questionable sites
- 2) Do not share your user number with others to gain computer use access
- 3) Do not install items to the computer
- 4) Do not reboot the computer
- 5) Do not download documents to the computer
- 6) Do not eat or drink while at the computer
- 7) Respect your user and do not disturb the person sitting next to your station

Thank you! We appreciate your cooperation. Happy surfing!

**PC Reservation®**      PC Reservation® Client Module      **System Time: 4:09 PM**

7. Click the language button.

*The system displays all language options.*



**Use Policy Guidelines**

Per this Computer Use Policy you are obligated to adhere to the guidelines outlined below. Violations to this policy will result in a block being placed on your patron record.

- 1) Do not visit questionable sites
- 2) Do not share your user number with others to gain computer use access
- 3) Do not install items to the computer
- 4) Do not reboot the computer
- 5) Do not download documents to the computer
- 6) Do not eat or drink while at the computer
- 7) Respect your user and do not disturb the person sitting next to your station

Thank you! We appreciate your cooperation. Happy surfing!

**PC Reservation®**      PC Reservation® Client Module      **System Time: 4:11 PM**

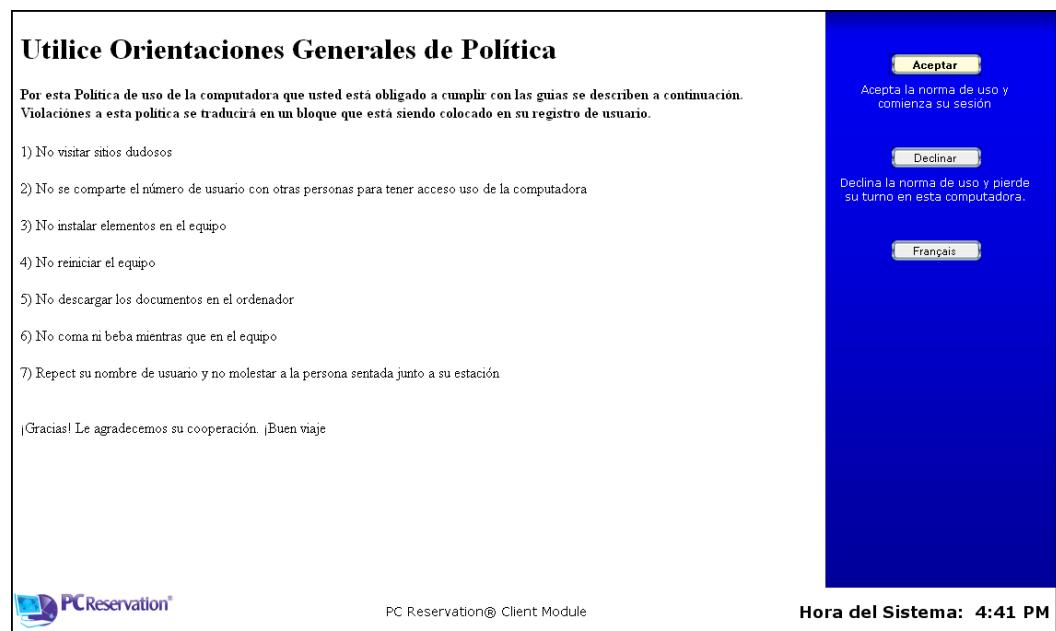
**Select Your Preferred Language**

**close**

 <a href="#">US English</a>
 <a href="#">English</a>
 <a href="#">Español</a>
 <a href="#">Français</a>

8. Click the language link of choice.

*The system changes the language to display the Computer Use Policy Screen in the chosen language. From this point and into the session, the PC Reservation user interface reflects the selected language translation.*



9. Continue until you are logged into a session.

*The system displays the PC Reservation Control Menu in the selected language.*



## Change the Language via the Control Menu in a Session

Complete the following steps to select your language translation while in a session from the Control Menu.:

1. Follow the directions via the PC Reservation interface to log in to a PC Reservation Client session.

*The system displays the PC Reservation Welcome screen above the Control Menu.*



2. Click the 'Other Options' button.

*The system displays the additional options.*



3. Click the 'Change Language' item from the menu.

*The system displays the language options.*



4. Select the language of choice by clicking on the desired link.

*The system displays the translated form of the Menu Bar buttons. Additionally, it displays any data viewable via the PC Reservation Client interface.*



**Note:** All interface items displayed in the examples above are configurable. All interface items may appear differently for your location based on configuration.

## Viewing the Welcome Message Screen

PC Reservation is enhanced to display a Welcome message which provides instructions to users about the Control Menu operation.

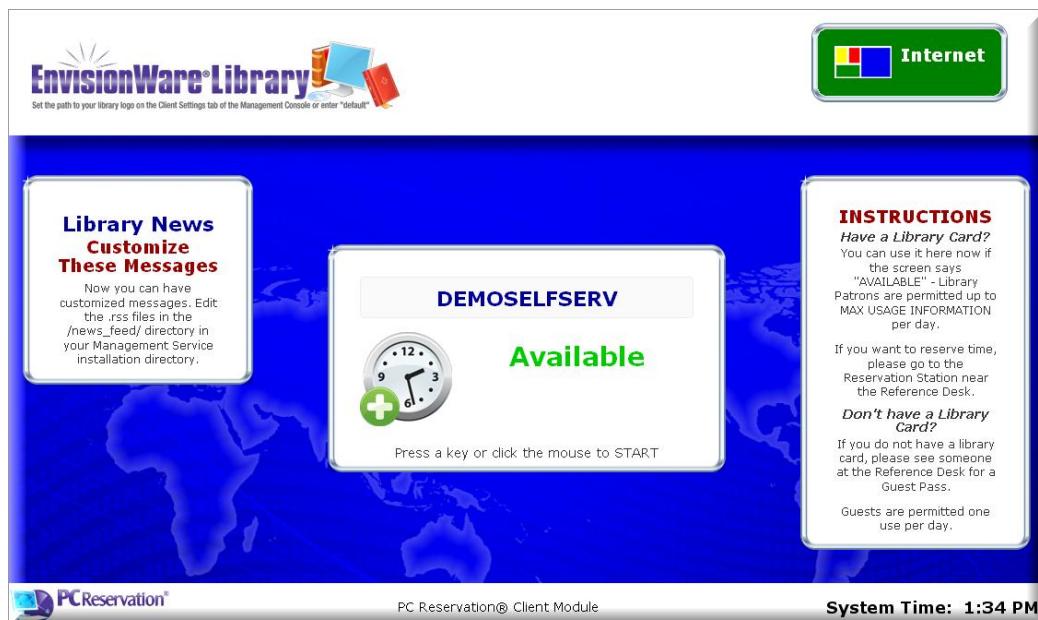
Complete the following steps to view the 'Welcome Message'.

1. Go to a PC Reservation Client computer.

*The system displays the PC Reservation Client idle screen. The login screen may also possibly be on display if a very recent user/patron has completed their use of the computer.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently.

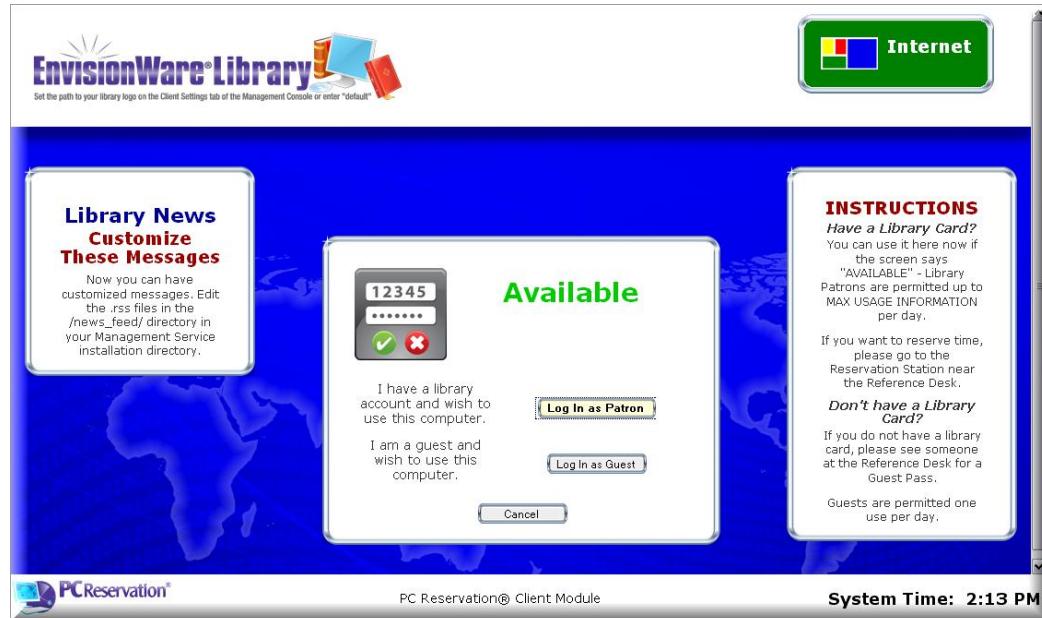


2. Press any key, click, or move the mouse to invoke the Login screen.

*The system displays the Login window.*



**Note:** The 'Login' screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option for Guest Users.



3. Click 'Log In as Patron'.

*The system displays the screen which requests the user to enter his or her credentials.*



**Note:** The request for credentials screen is configurable. Based on the configuration of the institution, this display may appear differently and may not include an option to enter both the User ID and PIN.



4. Enter your credentials (Library Card Number & PIN) as requested.
5. Click the 'Log In' button to access computer use.

*The system displays the confirmation screen.*



**Note:** If the system is not configured to use Validation the 'Session Charge' label is not visible.



6. Click 'Confirm'.

*The system displays the Computer Use Policy.*



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently or it may not appear at all.

**Use Policy Guidelines**

Per this Computer Use Policy you are obligated to adhere to the guidelines outlined below.  
Violations to this policy will result in a block being placed on your patron record.

- 1) Do not visit questionable sites
- 2) Do not share your user number with others to gain computer use access
- 3) Do not install items to the computer
- 4) Do not reboot the computer
- 5) Do not download documents to the computer
- 6) Do not eat or drink while at the computer
- 7) Respect your user and do not disturb the person sitting next to your station

Thank you! We appreciate your cooperation. Happy surfing!



PC Reservation® Client Module

7. Click 'Accept' to access the computer.

*The system opens a session and displays the welcome window above the Control Menu.*



8. Click 'OK' to close the Welcome window and begin using the computer.

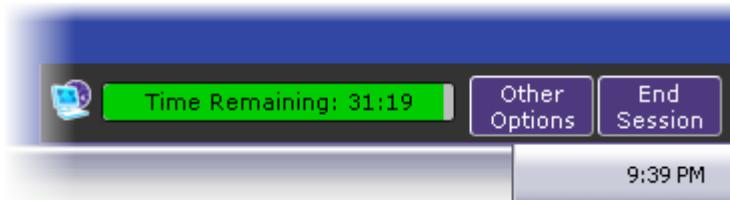
*The system closes the window and displays the full desktop.*

## Monitoring 'Session Time' During a Session

Complete the following to monitor a user's session time remaining:

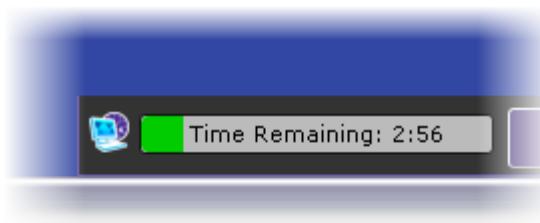
1. Complete '**Making a Reservation via a Client Using @Client Reservations**' or '**Signing Into Your Reservation**' in the previous sections to sign into a session.
2. Locate your '**Control Menu**'. Depending on configuration it could be located in one of the following positions:
  - Lower right corner (Default)
  - Bottom Center
  - Lower left corner
  - Upper left corner
  - Upper center
  - Upper left corner

*The system displays the '**Control Menu**'.*

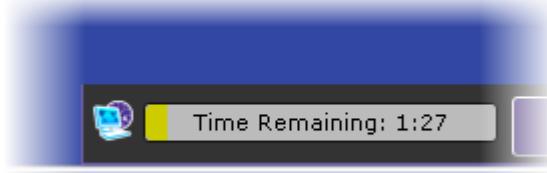


- Elapsed time is illustrated via the **green** color bar which decreases as time counts down. Additionally, the text displays the total time left over in your session.

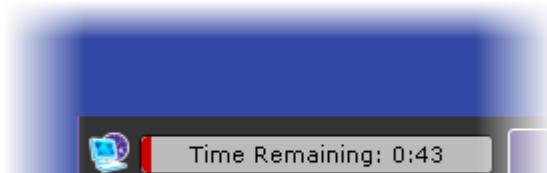
3. See the following stages of the '**Timer**' which convey visually the amount of time remaining:



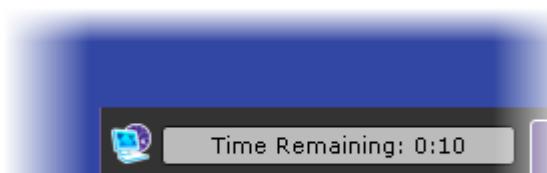
- The location of the **green** color bar is greatly decreased reflecting a contrast between the time used and the time left over, which is 2 min and 56 seconds.



- When the timer reaches a low threshold (less than **2** minutes), the color bar changes colors and reflects a **yellow** color bar.



- When the timer reaches a lower threshold (less than **1** minute), the color bar changes colors and reflects a **red** color bar. This is designed to convey that the session end time is imminent.



- When the timer reaches its lowest threshold (less than **30** seconds), the color bar no longer exists. This is designed to convey that the session time is exhausted and the session is closing out.



**Note:** Warnings are configurable. When configured, a maximum of three warnings may display to remind the user of his or her remaining time. As the warning is displayed, the background is colored orange and blinks for immediate recognition.

See the following example of a displayed warning:



---

*The system closes the PC Reservation Client program and reverts back to the PC Reservation Login screen.*

## Hiding a Session using the Control Menu Buttons

Hiding a session in PC Reservation version 4, is similar to PC Reservation Version 3.x functionality which is referred to as “locked” sessions. The name was changed to more accurately reflect the behavior based on feedback from the user community. This functionality is only available when the **Allow Users to Lock Session** setting is enabled via Management Console Preferences.

Complete the following steps to ‘Hide a Session’ when using the default ‘**Control Menu Buttons**’.

1. Click the ‘**Other Options**’ button from the Control Menu seated to the right and above the Windows Taskbar (default position).

*The system displays the options available for this task.*



2. Click the ‘**Hide Screen**’ icon.

*The system displays the user interface that allows the user to create a password for hiding the screen. Additionally, it records the number of minutes they have remaining before the session ends.*



3. Read the information provided and enter your unique and arbitrary password value.
4. Click the '**Hide My Screen**' button to execute your request.

*The system reverts to the PC Reservation intro screen and then displays the PC Reservation Client Main screen depicting the Client's status.*





**Note:** In Version 3.x, the default message was "LOCKED". Text is improved to accurately reflect the status.

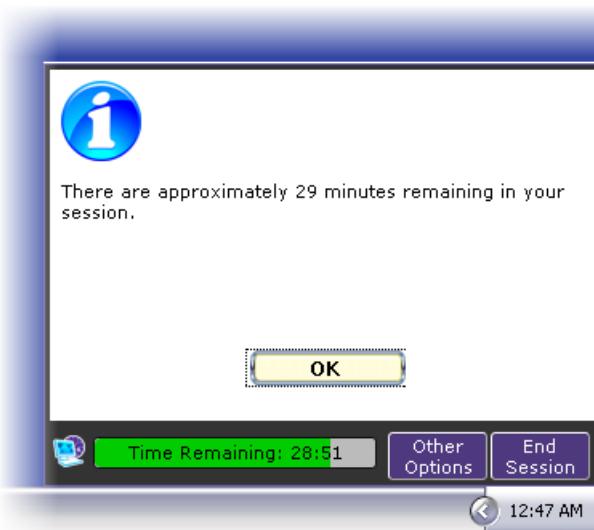
5. Resume your session by following the instructions on the screen. Click the screen or move the mouse.

*The system displays the resume session interface.*



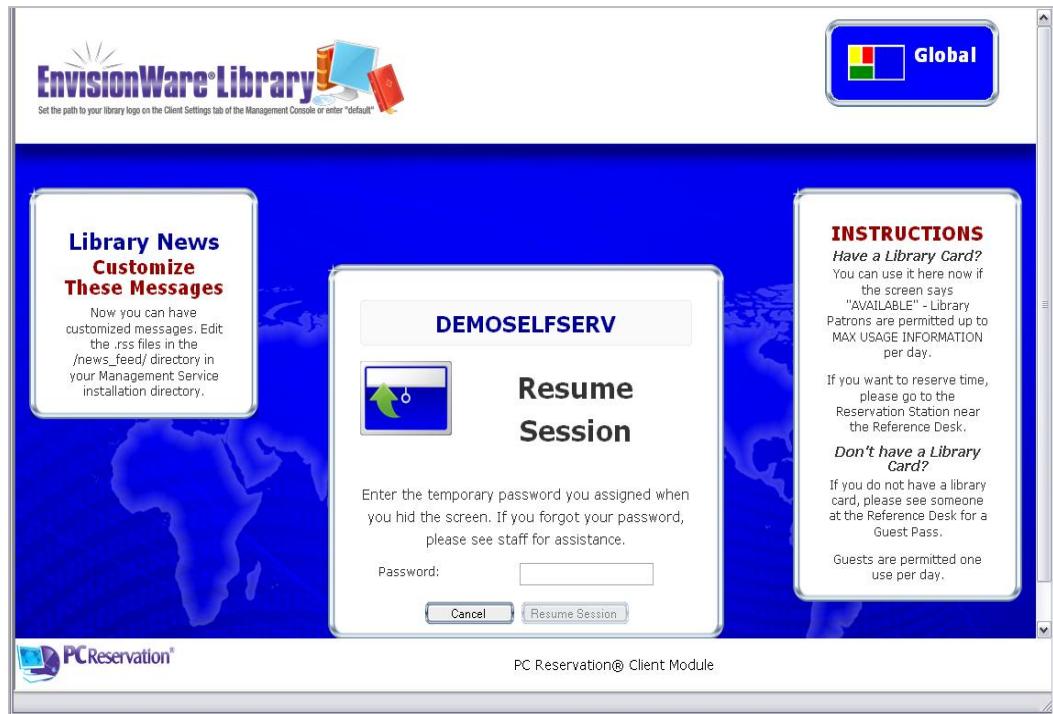
6. Enter the password used to hide the screen.
7. Click the **Resume Session** button.

*The system displays the Resume Session screen showing the remaining session minutes.*



8. Click **OK** to close the message.

*The system displays the Resume Session screen.*



9. Enter the password used to hide the screen.

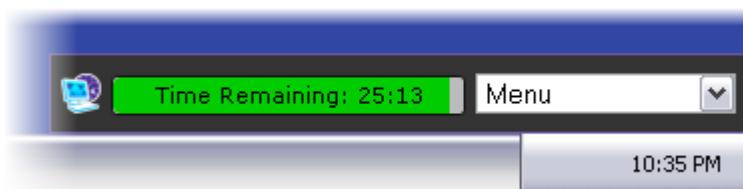
*The system returns to the PC Reservation session desktop.*

## Hiding a Session using the Control Menu Combobox

Hiding a session in PC Reservation version 4, is similar to PC Reservation Version 3.x functionality which is referred to as “locked” sessions. The name was changed to more accurately reflect the behavior based on feedback from the user community. This functionality is only available when the **Allow Users to Lock Session** setting is enabled via Management Console Preferences.

Complete the following steps to ‘Hide a Session’ when using the non-default, configurable ‘**Control Menu Combobox**’.

1. Locate the Control Bar seated to the right and above the Windows Taskbar (default location).



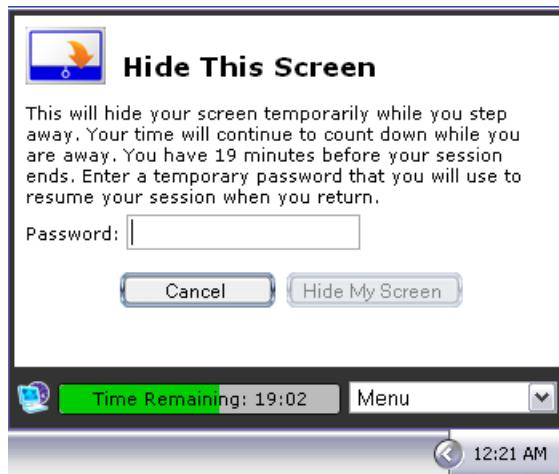
2. Click the arrow from the ‘Combobox’.

*The system displays the menu options.*



3. Select ‘**Hide My Screen**’ from the Control Menu.

*The system displays the user interface that allows the user to create a password for hiding the screen.*



4. Read the information provided and enter your unique and arbitrary password value.
5. Click the '**Hide My Screen**' button to execute your request.

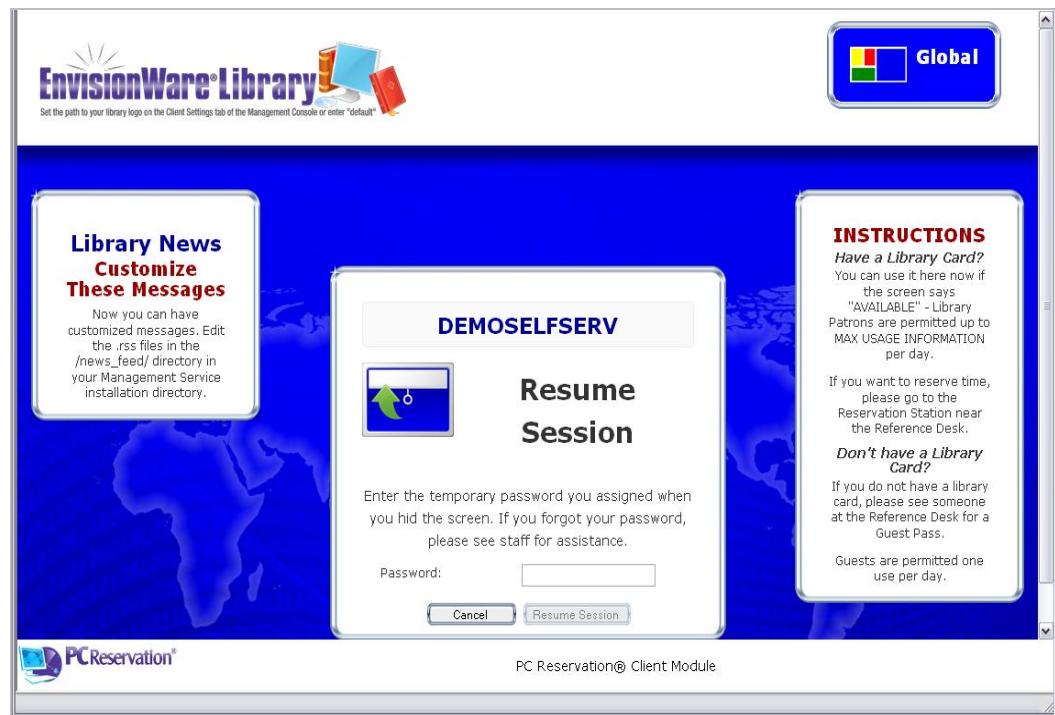
*The system reverts to the PC Reservation intro screen and then displays the PC Reservation Client Main screen depicting the Client's status.*



**Note:** In Version 3.x, the default message was "LOCKED". Text is improved to accurately reflect the status.

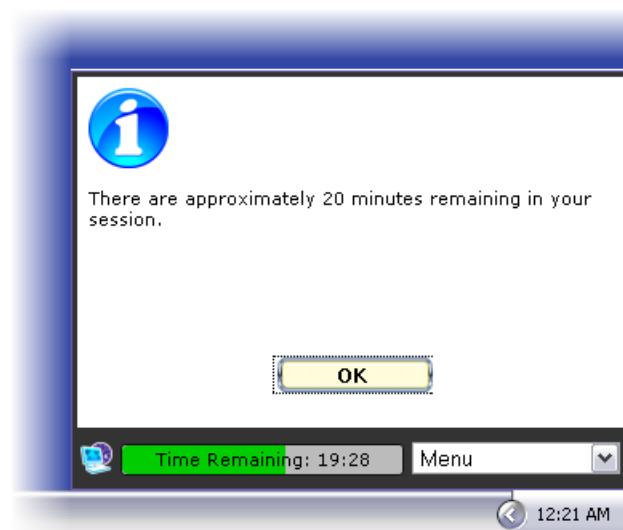
- Follow the instructions provided via the screen to resume your session. Click the screen or move the mouse.

*The system displays the resume session interface.*



- Enter the password used to hide the screen.
- Click the **Resume Session** button.

*The system displays the Resume Session screen showing the remaining session minutes.*



- Click **OK** to close the message.

*The system displays the Resume Session screen.*



10. Enter the password used to hide the screen.

*The system returns to the PC Reservation session desktop.*

## Ending a Session using Control Menu Buttons

Similar to PC Reservation Version 3.x, users can end their session at any time. The Control Menu Buttons are the default display for version 4.2 and higher.

During a session users/patrons may see between one and three messages appearing to remind them of their session end time. When users end a session, all programs that were opened during the session are closed.

Complete the following steps for a user that is presently signed into a session and wants to end his or her session:

1. Click the '**End Session**' button via the Control Menu.

*The system displays the option to verify and end session request.*



2. Click '**End Now**' to close the session immediately.

*The system ends the session, reverts to the 'PC Reservation' intro screen and then the PC Reservation Client Main screen.*

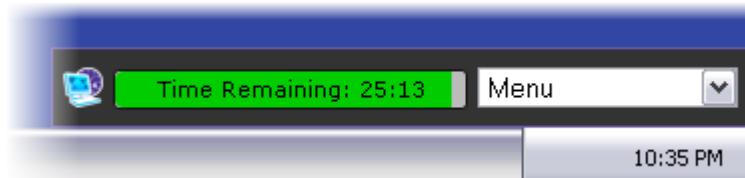
## Ending a Session using Control Menu Combobox

The Control Menu Combobox was the default in versions 4.1 and earlier. Beginning with version 4.2, this option is no longer the default option but can be easily configured for use.

While users/patrons receive configurable notifications on their remaining time, they have the option to end the session at any time. When users end a session, all programs that were opened during the session are closed.

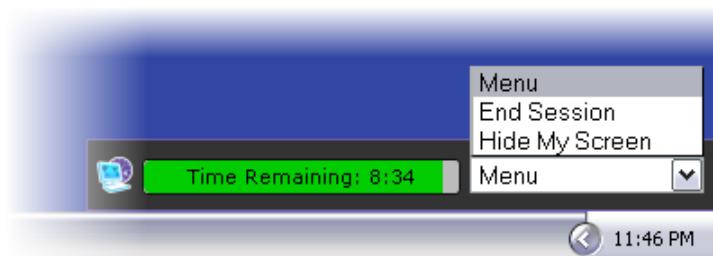
Complete the following steps for a user that is presently signed into a session and wants to end his or her session:

1. Locate the Control Bar seated to the right and above the Windows Taskbar.



2. Click the arrow from the 'Combobox'.

*The system displays the menu options.*



3. Select **End Session** from the Control Menu.

*The system displays the End Your Session screen.*



4. Click **End Now** to end the session or click **No** to resume the session.

*The system ends the session, reverts to the 'PC Reservation' intro screen and then the PC Reservation Client Main screen.*

## Chapter 4 – Performing Staff Functions

This chapter includes most functions performed by Staff from the Management Console, Staff Managed Reservation Station, PC Reservation Client, and Reporting Module.

### Identifying Client Login Statuses

The PC Reservation Client status changes according to various states of the PC Reservation Client application. See the following list of PC Reservation Client Statuses and their description:

- **Available:** If there are no pending reservations, this status displays indicating that users/patrons are free to either reserve the computer or perform an @Client Reservation.



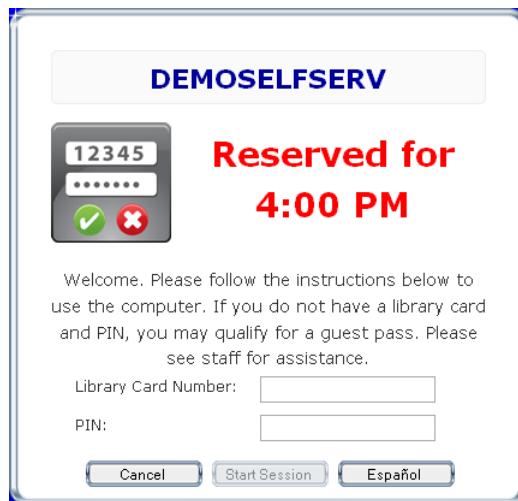
- **Reserved:** If a reservation or session is booked or pending for the computer and there is not enough time available for another user to have a 'Short' session, this status displays.



---

**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently in respect to credentials requested. Additionally, a 'Short' session is a configurable option as well.

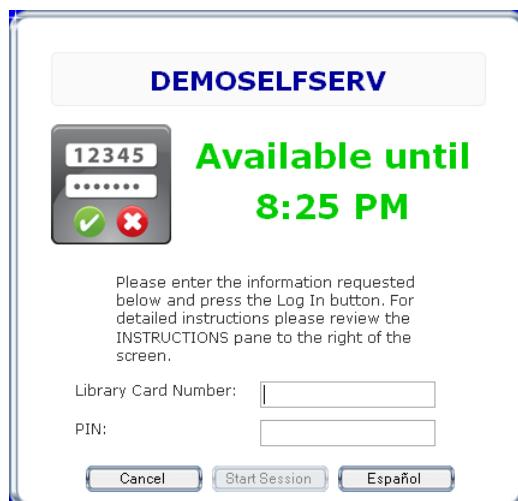
---



- **Available until xx:xx PM/AM:** If a reservation or session is booked or pending for the computer and there is enough time available for another user to have a turn on the computer, this status displays. This is an example of a reservation that is next in line.



**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently in respect to credentials requested.



- **In Use By Another Patron:** Displays when a user/patron chooses to 'Hide' their screen when away from the computer. Hiding the screen allows the user/patron to not lose their session should they need to step away, and not have someone else take over their session.

However, the user's/patron's time continues to count down. This is an illustration of a pending future reservation.



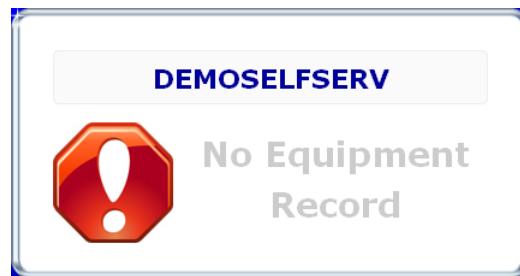
**Note:** This display is configurable. Based on the configuration of the institution, this display may appear differently in respect to credentials requested. Additionally, 'Hiding' a screen is a configurable option as well.



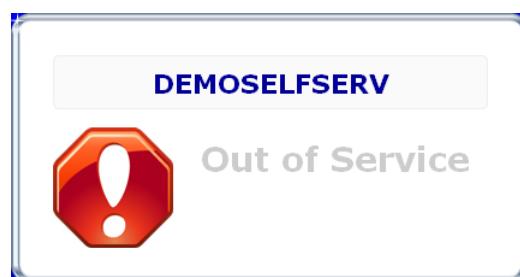
- **On-Hold:** If the user's session was interrupted due to a power outage or loss of network connectivity, etc. Basically anything that causes the PC Reservation Client to close unexpectedly and improperly is recognized as an interrupted session and invokes the **On-Hold** status.



- **No Equipment Record:** When the PC Reservation Client software is initially installed, it immediately reports itself to the Management Console. Changes must be made at the Management Console to create an equipment record for the newly connected PC Reservation Client.



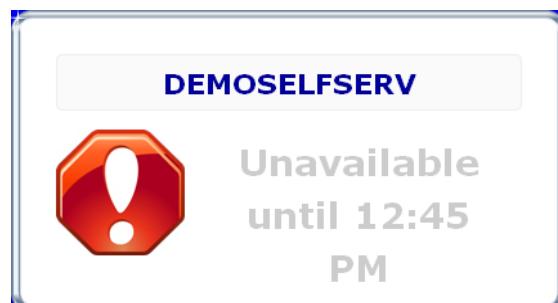
- **Out of Service:** Setting a specific PC Reservation Client to 'Mark as Out of Service' via the Management Console displays this status. This status allows staff to perform maintenance if needed and remove it from the list of computers available for reservations/use.



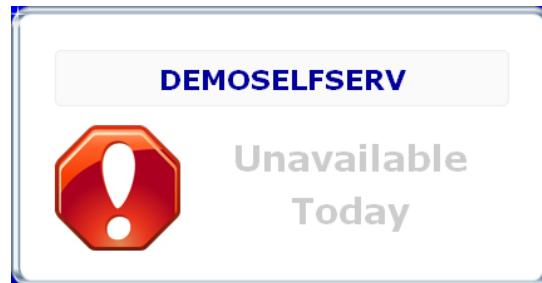
- **Unavailable Due to Closing Time:** Displays when the computer schedule for a given computer has reached its closing time. This status displays until the following day when hours of operation has reached the opening time.



- **Unavailable until xx:xx:** Displays when the Client's 'PC Schedule' located in the Management Console Preferences or its 'Area' schedule are set to open later than normal hours of operation.



- **Unavailable Today:** Displays when the facility PC Schedule located in the Management Console Preferences, is set to 'Closed'.



All Statuses are intended to be self explanatory and easy to read and understand.

## Performing a Super-User Login

The Super-User mode allows staff to take immediate and unlimited control of any computer running the PC Reservation Client.

Complete the following steps to perform a Super-User Login:

1. Locate the PC Reservation icon in the lower left hand corner of the idle screen as depicted below.



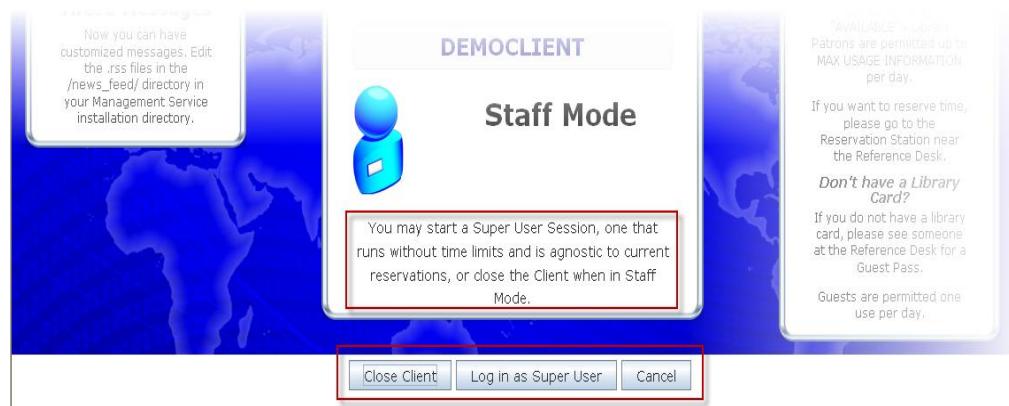
2. Press and hold the **Ctrl** key while double clicking on the **PC Reservation** icon.

*The system prompts the staff to enter a password.*



3. Enter the **staff password** and click **OK**.

*The system changes its status and provides two options for the staff member.*



**4. Choose the 'Log in as Super User' option.**

*The system opens a PC Reservation Client session allowing access to the desktop. The system displays an information display to announce the user is logged in as a Super User. Additionally, the Status Bar reflects that the Client is operating in Super User Mode in place of where the timer sits.*



**5. Click 'OK' to close the message box.**

*The system closes the message box.*

## Performing a Stand-Alone Login

Stand-Alone mode is a beneficial option. It provides the ability for Staff to maintain access to computers regardless of a disconnect of communications between the PC Reservation Client and Management Service. See section '**Configuring the System for Stand-Alone User Credentials**' in the PC Reservation V4 Administrative manual for more information about this functionality.

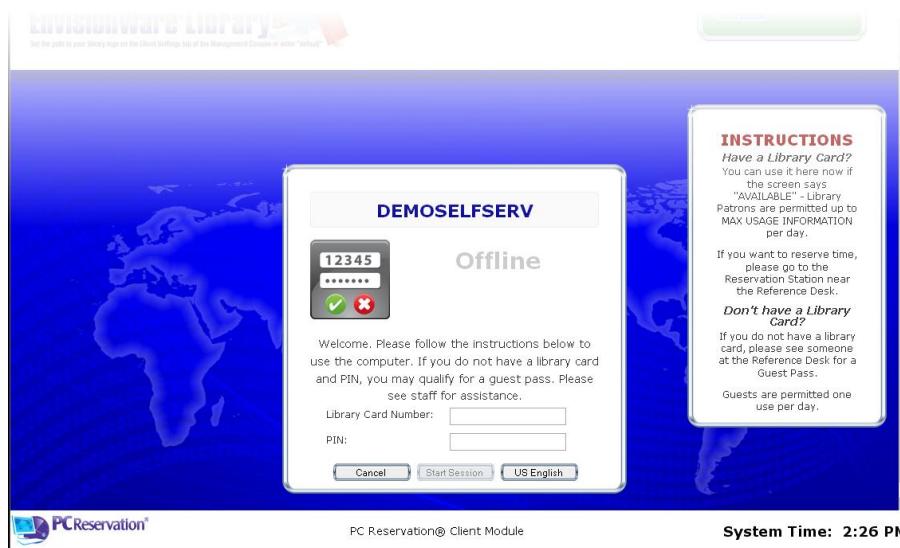
Once communications are lost between the PC Reservation Client and the Management Service, the Client screen changes to reflect the following display:



Complete the following steps to perform a Stand-Alone Login:

1. Press any key, click, or move the mouse to invoke the Login screen.

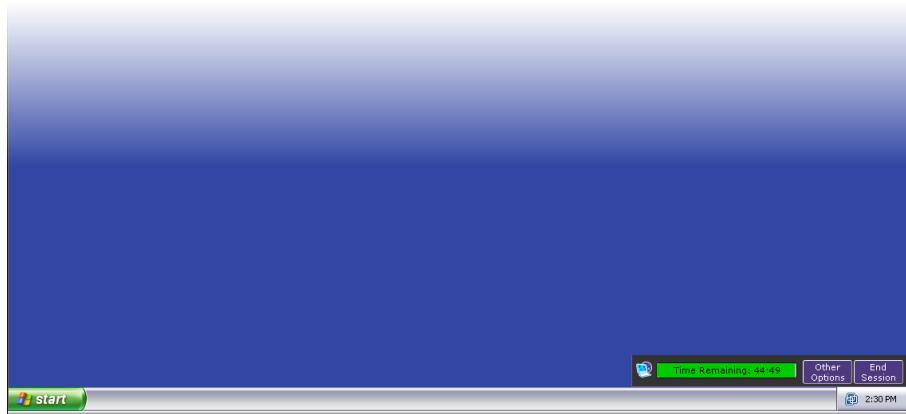
*The system displays the Login window.*



3. Insert the '**Account Name**' and '**PIN Number**' provided by a staff member, in the appropriate space.

*The system enables the 'Start Session' button.*

2. Click the '**Start Session**' button to submit the credentials and access the computer.



*The system allows access to the computer desktop. The timer reflects the amount of time remaining in the Stand-Alone session. This time is the same time as the default session time for the system.*

## Customer Feedback

If you have questions or feedback concerning this publication or need assistance, please contact us at [documentation@envisionware.com](mailto:documentation@envisionware.com).